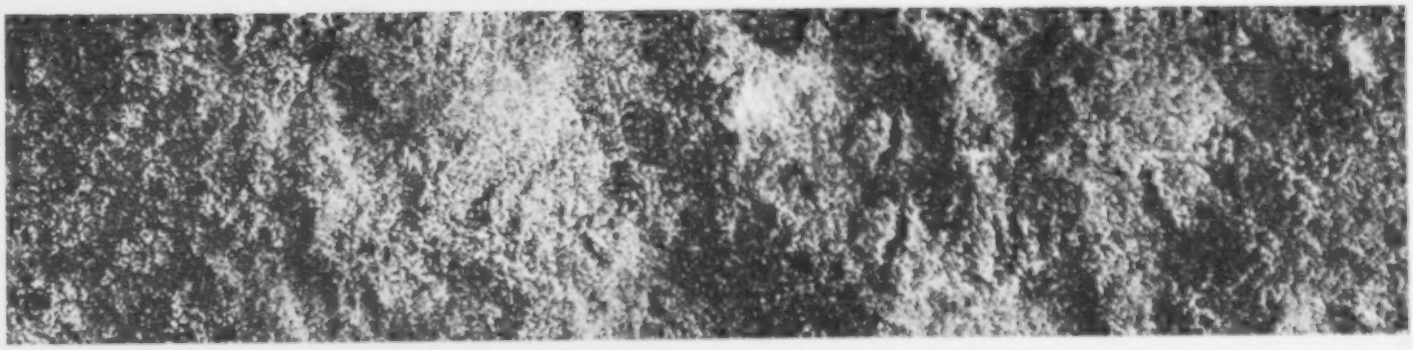

Report on the

Review of the Goals and Objectives of Funeral Service Education in the Province of Ontario 2001

Submitted To:
The Board of Funeral Services and the Education Review and Licensing Committees

George Bedard and Burle Summers, Consultants

105-03399/

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MANDATE AND ACKNOWLEDGEMENTS

It is my pleasure to present the report on the Review of the Goals and Objectives of Funeral Service Education in Ontario.

This report is the culmination of twelve months of thoughtful review, investigation and reflection by a large number of individuals and groups. It provides recommendations that are designed to continue the improvement of our education and training of both new and experienced funeral directors.

As part of its regulatory mandate to ensure the continuance of high educational standards, the Board of Funeral Services ("BOFS") initiated this review in January 2000. The Education Review Committee of the Board has closely monitored the study's unfolding and has provided timely feedback and direction to the consultants during each phase of the process.

The Board and its committees will review the recommendations and authorize implementation in a staged and orderly fashion. I invite you to read the report and consider the implications of the recommendations.

The cooperation and support of many individuals and groups were critical components to the successful completion of this report. In particular, we gratefully acknowledge the following groups and individuals for their efforts:

- The Education Review Committee (see list of members on page three);
- The members and staff of the Board who provided vital support and insights during each phase of the review process;
- The faculty and administrative staff of both Humber College and College Boréal arranged interviews with advisory groups and with staff and set up group meetings with students and interns;
- The Ontario Funeral Service Association ("OFSA") made available the data and findings from their 1997 survey of members on issues related to pre-admission, academic programme and internship. For the current report, OFSA also organized regional focus groups across the province to ensure that grass roots views were heard on an even wider range of issues; and
- Many funeral directors, students and interns took the time to complete and return the comprehensive surveys distributed by mail by the Board of Funeral Services

I invite your cooperation and I look forward to working with you as we implement the recommendations in this report.

Sincerely,

Scott Doney
Chair of the Education Review Committee
Chair of the Board of Funeral Services

COMMITTEE TO REVIEW THE GOALS AND OBJECTIVES OF FUNERAL SERVICE EDUCATION IN THE PROVINCE OF ONTARIO

Board of Funeral Services ("BOFS")

Scott Doney	Chair, Education Review Committee Chair, Board of Funeral Services
Bruce Humphrey	Funeral Director Member
Dr. William Steadman	Public Member
Joseph Richer	Registrar
Susan Beck	Manager, Licensing & Administration

Funeral Service Education Programs

Richard Yelle	Dean of Health Sciences, Collège Boréal
Norman Blanchard	Professor, Collège Boréal
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Ward Yorke	Professor, Humber College

Ontario Funeral Service Association ("OFSA")

Kent Milroy	President, Ontario Funeral Service Association
Bruce Cooke	Funeral director
Lynne Atkinson	Executive Director (After January 2001)
Sheelah Brodie	Executive Director (Until January 2001)

Recent Programme Graduates

Paul Shedden	Funeral director, Humber College
Shawn Bellefeuille	Funeral director, Collège Boréal

INTRODUCTION

The aim of this report is to highlight key issues and to identify necessary changes to funeral service education in Ontario. The focus is broad and includes the pre-admission process, academic programme, internship, licensing, and professional development. The issues we identified and the questions we asked were in large part articulated by the Education Review Committee.

The regulatory powers of the BOFS are set out in the *Funeral Directors and Establishments Act*, Revised Statutes of Ontario, 1990, Chapter F. 36, as amended (the "Act"). Subsection 3(3) of the Act addresses the role of the Board in establishing, maintaining and developing standards of knowledge and skill, standards of qualification, standards of practice, and professional ethics, for funeral directors and persons who operate funeral establishments and transfer services. The educational aspects of our study touch on each of these mandated areas within the BOFS's purview. The purpose of the BOFS is to serve and protect the public interest.

OVERVIEW

The analysis is based on research, undertaken throughout most of 2000, including the following sources of information:

- Focus groups
- Survey data
- Interviews
- Meetings
- Document analysis
- Internet searches and phone calls

We held focus groups with over 200 individuals in Alliston, Toronto, Mississauga, Grimsby, Thunder Bay, Kingston and Lucan, towns and cities reflective of a cross-section of Ontario's funeral services. Some were small groupings of around 10 individuals; some, like the two-day Professional Development 2000 Programme at the Toronto Hilton, involved over 140 individuals. Taken as a whole, the focus groups featured a mix of female and male funeral directors, including owners, managers and employees representing both independent and corporately owned funeral homes. These people also reflected a wide range of years of experience.

We visited Humber College and Collège Boréal and spoke with approximately 220 individuals (students, interns, staff, administrators, and representatives of both Colleges' Advisory Committees) and we followed up some of these information sessions with additional meetings.

We developed a lengthy questionnaire, consisting of 64 questions that we mailed to over 1000 licensees, registrants and students; 210 respondents took the time to give us their opinions. Most questionnaire respondents had not taken part in focus groups.

The Board and the colleges made available to us several cartons of documents including memos, correspondence, magazines, newsletters, annual reports, statistics, and internal survey material. We supplemented these sources of data with Internet searches and phone calls.

The OFSA helped us organize focus groups throughout the province and they provided us with the data and findings of their own 1997 report that surveyed members' opinions about pre-admission, academic programme and internship.

We met often with representatives from the Education Review Committee to get feedback on the development of our research instruments and to keep them abreast of our activities.

We carefully noted what was said in each of our gatherings and these notes, when added to other written records, added up to well over 150 single-spaced pages. We tabulated the survey results and fashioned graphs to illustrate the findings. The results from the opinion survey are displayed in the Appendices.

Our final task was to make sense of the data in an inductive fashion and to try to answer the question of what it all meant for the goals of this educational review. We approached this process of interpretation as outsiders – two individuals who do not come from the ranks of funeral directors. As former educators, school administrators and present-day programme evaluators without funeral service expertise, we ourselves had to be schooled about this vital but understudied profession. Our instructors were primarily the people with whom we met in the first six months of 2000 and those who responded to the questionnaire. We owe a large debt of gratitude to all who participated in this study and who graciously shared their insights, passion, and creativity with us.

In the process, we have tried to give due process to varying and sometimes conflicting perspectives, ideas, and proposals. In the final analysis, however, what follows is our interpretation on what we heard, read, saw, and discussed about funeral service education and what we, as consultants, think it means for the reform agenda.

While we have tried to ground some of our thinking in our knowledge of professional educational standards and practices, we realize that the recommendations will require careful thought, ongoing support from leaders in the profession, and adaptation to specific funeral homes across Ontario. The limited amount of current research literature on funeral service education in North America makes this research even more timely and necessary for funeral service in Ontario. We have identified

important trends and descriptions of best practices, which form the basis of our recommendations.

More importantly, we recognize that the educational reform process is complex and is driven less by faith in cause and effect certainties – "the research says do this" – and more by the exercise of leadership and the development of organizational capacities that encourage renewal over a protracted period. The leadership of forward thinking funeral directors led to this study and we are confident that their proactive role will be steadfast in adapting, directing, and supporting the implementation of the recommendations.

We now move to inform readers about issues and concerns and to provide some options about what to do about them – for pre-admission, college programmes, internship, licensing and professional development.

FUNERAL SERVICE EDUCATION: VOCATIONAL, PROFESSIONAL AND NETWORK ASPECTS

Three core messages set the framework for our recommendations. Firstly, funeral service is a unique vocation that places special demands on its professionals and on the ways and means by which members are admitted, educated and trained. Secondly, we agree with most research participants that various elements of funeral service education need a more professional foundation. Heading in a new direction means abandoning some aspects of a more traditional trades-based orientation. [1] Thirdly, guiding members in the direction they want to go requires the development of a professional network to support a coordinated and focused renewal of educational goals. The Board of Funeral Services must ultimately play a significant leadership role along with all partners in the funeral service field – college staff and administration, the professional organizations, students, interns as well as government and other related groups.

The funeral service profession is both craft-based and personal-service oriented. Some individuals become funeral directors because of family tradition and succession, but many "outsiders" are also "called" to work in this field, hence a vocation. This vocation is close-knit, with an organizational culture that differentiates funeral service from other personal service professionals. Hence, the pre-admission process is critical to determining whether an individual has the vocational calling to learn unique and demanding interdisciplinary roles.

[1] For more information on this thinking see "Professional Or Tradesman? Mortuary College Chief Speaks Out On Funeral Service Today-And Tomorrow". Funeral Service Monitor, April, 1998, Vol7, No. 17; "Tomorrow's Professionals". The Director, April 2000. For a clear exposition of the nature of professional work and the importance of the standardization of skills and training, see Henry Mintzberg, "The Professional Bureaucracy", pp. 348-379, in The Structuring of Organizations, 1979, Prentice –Hall, Inc., Englewood Cliffs, N.J.

While roles may be learned, as by an actor in a play, the attributes of character are not so malleable. Research participants told us that the funeral service profession is as much character-driven as knowledge and skills based.

As we listened to research participants describe best practices and those who exemplify them, what emerged was the following amalgam of character attributes, knowledge, and skills:

- honesty and integrity
- mastery of technique
- maturity
- caring and compassionate
- emotional stability and resilience
- superb inter-personal, teamwork, and communication skills
- a strong work ethic, flexibility, and personal initiative
- sensitivity to a growing diversity of peoples, cultures, and belief structures
- business acumen, leadership skills, and entrepreneurship
- adaptability in a competitive marketplace

While some of these attributes and skills are generic to a range of contexts[2], their particular application in the funeral service profession makes demands on its practitioners that are shared by no other vocation or profession. It is not a profession that should be casually entered into by job shoppers, the curious or the immature. The simplest definition of what funeral directors do is that they prepare the dead for burial, often by embalming, and they organize rituals that help the living mourn and bid farewell. While the elderly are the usual cases, funeral directors deal with death in all of its manifestations: babies, teenagers, young adults, the rich and the destitute, the family loved ones and the unspeakably lonely. Any death may present a grim challenge even to the most technically skilled and emotionally stable funeral director – hours are long, sporadic, and often holidays are few and far between.

To the casual observer, the suits, limousines, and well appointed funeral homes are indicators of funeral director wealth. To funeral directors, however, they are the necessary costs of providing a service, traditional overheads that must be met. In the generation of dot.com millionaires and the age of hyper-consumerism, the compensation for funeral service employees is modest and the profits for owners of single funeral homes are generally slim if any.

The environment that surrounds funeral directors is not overly supportive and is changing rapidly. Public opinion varies widely as to the value of the service that funeral professionals provide, ranging from the supportive, to the wary, and to the

[2] For Example, see "Top 10 Personal Characteristics Employers Seek In Job Candidates" in The Director, April 2000, p. 35.

highly critical.[3] In our youth obsessed culture, preparing and planning for one's death is a low priority for most people. For many, arranging a funeral service is most often a last-minute exercise. Potential customers or clients have increasing difficulty sorting out the services and products that are available from the numerous providers.

Yet for most of those who are called to work in this demanding and serious field, the funeral service profession offers its members a people-centred lifestyle, vocation, and profession they would not willingly exchange for another. [4]

The funeral profession's nexus with death and mourning may well assure that most job-searching individuals would not be tempted to join its ranks casually. Still, every year in Ontario well over a hundred and fifty people undergo some form of pre-admission scrutiny, many with minimal exposure to the real world of funeral service. It is the responsibility of funeral service professionals and college staff to ascertain whether an individual shares their calling. The basic suitability of the individual for the profession can only be ascertained by scrutiny of work related behaviour, by genuine exchange of views, ideas and opinions, by honest evaluation of the individual's merits, and by the probing of character. Research participants told us that more should be done to improve the screening of candidates to the funeral profession.

If the concept of vocation is a core element for understanding funeral service, so too is the notion of professionalism. One benchmark of professional work is that its practitioners have obtained at least the equivalent of an undergraduate university degree, followed by a variable period of specialized education, internship, and licensing and accreditation. By that standard alone, most funeral service providers, who do not have university backgrounds, may believe they fall short.

But, there are other equally important ways of categorizing work that is characteristic of a profession; research participants gave voice to many of them. Such indicators include the recognition that the key to providing a quality personal service lies in standardization of practitioner skills coupled with the exercise of professional discretion. Key design components for standardization of skills are education, training, and ongoing professional development. Other indicators of professionalism cited by research respondents include an emphasis on shared beliefs, values, attitudes, and the importance of socialization in the inculcation of norms and standards.

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[3] *Consumer Attitudes, Knowledge and Trends Regarding The Funeral/Memorialization Industry in Canada*, April 1996. Prepared for The Funeral Profession Coalition of Canada by Butler Research Associates.

[4] For autobiographical insights about the life of a small-town Michigan funeral director, we direct the reader to Thomas Lynch, *The Undertaking—Life Studies From the Dismal Trade*. Penguin Books, 1998, Harmondsworth, England. *The Undertaking*, published in a hard-cover edition by Norton in 1997, was a (US) National Book Award Finalist. Lynch comes from a family of funeral directors and has been working full-time as one for over 25 years. He is also a published poet.

Taken as a whole, the issues cited by research participants underscore their desire for a greater degree of professionalism. They recognize that funeral service has evolved well beyond being a sideline of other trades such as carpentry or furniture outlets, and they appreciate that better education and training helped upgrade the status and calibre of their work. They acknowledge an imbalance between rising educational levels in society and what their own profession currently requires of them. They want their educational network to help them expand their professional repertoire, cope with an increasingly competitive business environment, understand and adapt to a rapidly changing society, and deal with the growth of regulatory frameworks.

Credentials mean something to professionals because they let members and the public alike know who should have the right and responsibility to practise within a given profession. Research participants told us that they want their credentials to mean more to the group and to the public. They recognized that reforms to the admission process, to the academic programme and the internship, when combined with high standards of practice and professional development, are critical determinants of the worth of credentials.

To sum up, research participants want educational renewal that is tailor-made to address the new needs of the funeral service profession in Ontario. The participants recognize that no college, association, or regulatory body working on its own is sufficient to affect this renewal because educative roles are shared by a number of organizations. Rather, what is required is a professional network. This network would need to correct what we consider a serious gap regarding the furtherance of educational goals that we have found among funeral directors, OFSA, BOFS and community college staff and administration.

In the remainder of this report, we outline what research participants told us are the significant issues in pre-admission, academic programme, internship, licensing, and professional development. Based on our reading, consultation and research in the field of funeral service and beyond, we then offer some recommendations for change in each of these areas.

A. PRE-ADMISSION

Some background on the Humber College Programme for Funeral Service Education.[5]

In the 1960s, the Board of Administration (present BOFS) vetted all candidates for entry to the academic programme. By 1969, Humber College, the new site for the programme, assumed this function. Students were required to attend two consecutive semesters in which the second was the apprenticeship. The Canadian School of Embalming ("CSE"), which ran the programme prior to Humber, had a requirement that all candidates for admission be employees of funeral homes, but this was soon dropped.

Grade 12 was the minimum education level accepted but with no specific subject or course requirements because the funeral service education programme was broadly based, a mixture of technique, human service, and business. For the candidate, a 40-hour observation period was required as well as an interview conducted by Humber College ("Humber") and BOFS representatives. Joint interviews proved unworkable due to time and coordination constraints when trying to consider a large number of candidates. Soon after, the interview process was in Humber's hands but it was abandoned (around 1980.) Humber instructors were concerned about their liability related to individual challenges.

With the cancellation of Grade 13 provincial examinations in 1968, a great variability emerged in high school evaluations – one school's "A's" were another school's "B's". The colleges reacted by introducing their own instruments of assessment, including testing for basic science knowledge (developed by Health Sciences) and English. If students did not pass these tests, they were not admitted to the programme. For staff, another problem stemmed from rejecting for admission the children of funeral directors and those of funeral directors' friends. The confidentiality of the pre-observation evaluation was begun in order to curb nepotism, and staff thought that most funeral directors took confidentiality seriously as a result of discussions during the last two years at OFSA district meetings.

[5] Some background information provided by Mr. Don Foster, the founding and long-term coordinator of the Funeral Services Programme at Humber College. Interview with G. Bedard, May 24, 2000. For more historical details, see "Evolution of Funeral Service Education in Ontario" (unpublished, June 1974) by John R. Finn, Instructor, Funeral Service Education, Humber College

Present Admission Requirements

Two Ontario community colleges offer accredited programs in funeral service education within Schools of Health Sciences – Humber College in Toronto and Collège Boréal ("Boréal") in Sudbury where instruction is mainly in French (after Boréal was spun off from Cambrian College in the mid-1990s to serve francophone students exclusively). Presently, the candidates to college programmes are required to meet the following requirements:

- Ontario Secondary School Graduation Diploma (O.S.S.D.) at or above the general level or equivalent, or mature student status
- Completion of personal questionnaire
- Prescribed observation experience in a funeral home
- Completion of questionnaire for funeral director who supervised observation experience
- Attendance at an information-sharing and assessment session
- Successful completion of pre-admission test for senior level Biology, Chemistry, writing skills, English vocabulary and comprehension
- Possess a valid St. John's Standard First Aid Certificate
- Possess a valid Class G Driver's Licence

Pre-admission Procedures[6]

At Humber, approximately 130 candidates are accepted to the programme each year and Boréal accepts approximately 25. Numbers admitted are determined by college policy and cost-recovery issues. Five places annually are reserved for out-of-province students.

During the 1980s and 1990s between 600-700 applicants per year were common. According to Humber sources, applicant numbers for 2000/2001 are down significantly. College staff and funeral directors equate "boom times" (strong economic times) with lower numbers of applications because burgeoning numbers of job and career opportunities compete for attention with the funeral service profession. For college staff, generally speaking, lower numbers of applicants equate to the acceptance of lower quality candidates. For the staff, this also means they must spend more time working with students to compensate for weak foundational knowledge and skills.

Both Humber and Boréal use a point system, refined many times over the years, to evaluate candidates. The point system includes a number of variables: secondary school transcripts, College Placement Tests, personal questionnaires, and funeral director questionnaires.

[6] Humber Programme and Career Facts. Funeral Service Education, School of Health Sciences. No date.

Pre-admission Issues

Judging from what we heard in focus groups and what we read in the surveys, most research participants did not perceive the pre-admission process as either fair or effective. For a graphic illustration of how respondents weighed in on pre-admission issues, please refer to the Appendix.

We heard that there is confusion as to the criteria by which candidates are chosen, the weighting assigned to each criterion, and the relative roles of college staff, funeral directors and the BOFS in the decision-making process for admissions. Some did not know why they failed to gain access on the first two applications; others were certain that a location for interning would guarantee acceptance. These reports originated equally with students and with funeral directors.

Many think that the screening mechanism should set a higher standard for entry into the profession. Many asserted that standards should not be narrowly defined as "marks" only. For many, what we would call the "character issue" is as important, if not more important, than scholastic ability. Evidently, character matters a great deal. Some of the attributes that people told us they valued in candidates include "serious and caring attitude", "passion", "maturity", "people-orientation", "inter-personal skills", "diligence and thoroughness", and "flexibility". Many doubted that the present process was adequate in probing character issues. Continued dialogue with stakeholders and a review of admission questionnaires are necessary to refine the information collected with regard to character suitability.

Maturity is an issue raised by college staff, many of whom wondered if a minimum age for entry should be established. According to demographic profiles supplied to us by the College, in the past several years at Humber around 25% of students at entry level are 19 years of age or younger. In the 2003 double cohort year, when the old five-year secondary school programme merges with the new four-year program, more students will be eligible to enter the programme at age 17.

To probe character issues, many strongly expressed the need for pre-admission interviews and the use of other instruments to scrutinize the "full package" that the candidate brings "to the table". Some suggested that candidates should demonstrate work or volunteer experience in a people-oriented and caring setting such as a nursing home or hospital. On the other hand, members of the Humber staff are opposed to the use of interviews for the same reasons as those articulated in the 1980s. They argue that funeral directors should serve a "gate-keeping" function and that the pre-observation form is designed for this purpose.

Several suggested that lengthening the programme and "toughening" the academic evaluation system would deter some less serious candidates from applying. Many suggested that key skills should be prerequisites, such as OAC/college/university level writing and communication skills, computing skills, and at least one science course.

Several participants maintained that candidates should understand that funeral service is not a "job" like other jobs, but rather is both a unique "vocation" and a distinct choice of "lifestyle". Many contended that the pre-admission process should serve to make vocational and lifestyle issues explicit to candidates. We were told that the profession and colleges did not adequately communicate the nature of the work involved in funeral service to potential candidates. This resulted in a hit and miss approach to the marketing of the profession to potential candidates and the influx of many candidates who possess unrealistic expectations of the work and compensation. Recent noteworthy efforts to address this problem include the refinement of the funeral directors' questionnaire and the OFSA's improvements to promotional material aimed at potential candidates.

Funeral directors, college staff and interns confirmed that funeral service required a professional approach and positive attitude, as well as a well developed set of personal traits including interpersonal skills, good work ethic, motivation to succeed and a high level of maturity. All agreed that courses prepared students for the technical aspects of funeral service but thought the candidate should arrive with characteristics suited to the expectations of the profession. There was widespread support for the reintroduction of an interview of candidates as the best way to try to determine candidate suitability.

We also heard that while funeral directors are responsible for the practical education of students, they have little input in the overall evaluation of a candidate, which is done primarily by college staff. The funeral director's input is given little weight.

While much weight is attached to the promise of an internship in the admissions process, some funeral directors told us such offers are provisional at best, and that college staff are too quick to assign undue weight to this promise in the admission process. On the other hand, college staffers report that most commitments are honoured by funeral directors.

The issue of nepotism was raised by a number of respondents, that some students got positive evaluations even though their performance may not have merited it because of "insider", often family-related, connections and because of "pressure from the community." We were told that the confidentiality that directors are asked to uphold when filling in the pre-admission observation form is sometimes not strictly adhered to, partly because funeral directors wish to give candidates feedback. Several funeral directors wanted more clarification of what their statutory obligations are when a candidate or intern is working on their premises.

Some people recognized that the new task-oriented format for pre-admission observation is an improvement over the 40-hour format. However, not many were aware of the new format, and fewer still had actually implemented it (many funeral homes do not receive pre-admission candidates). Students complained about a lack of time to view or experience tasks, inadequate access to experiences and no time

for discussion with funeral directors. The time-frame for observation, although not now confined to 40 hours, is still constricting enough so that on occasion neither the candidate nor the director feels comfortable making an informed decision. Several respondents warned, however, that the observation period should not be expanded to the point where candidates are exploited as cheap or free labour. Opinions were mixed as to whether secondary school co-op programs were of value in sensitizing students to the realities of the profession. Opinions also varied whether an expanded pre-observation period should require some compensation for the candidate.

The issue of failures and drop-outs in the academic programme was cited both as evidence of high standards being maintained, and as evidence that too many students without "the right stuff" are being admitted. In the class of 1999-2000, about 30 students have dropped out of Humber (percentages vary from year to year from 20 to 30 %) and about 10 have dropped out of Boréal. Dropping out is attributed to a number of factors: poor academic preparation, bad work habits, attitude, and a mismatch of expectations. We were told that weaker students require a great deal of remediation, placing a greater burden upon instructors. Areas in which students require remedial attention include academic in general, sciences, assignments, computer skills, and communication, especially writing skills. Some attribute what they consider as a high drop-out rate to the inadequacy of the screening process to eliminate weaker candidates before they can enter the programme. Some resentment was expressed by several directors at students who drop out because they did not "fit in" – such students should have been screened out at the beginning so that more deserving candidates may be allowed in.

In "boom times", fewer less applications are received and there is a dilution of quality of the general cohort. Excellent candidates pursue job opportunities outside the profession, which offer better salaries, more stable working hours, and better working conditions.

A: Recommendations for Pre-admission

These recommendations are made with the intention of making the present pre-admission process more transparent, developing shared responsibility for access to the profession, and ensuring that the admission process is seen as fair to all concerned while recognizing those who have surpassed the minimum requirements.

A-1 Appoint a representative Admissions Panel to review the admission process and share the responsibilities between the profession and the colleges. This panel would be responsible for reviewing criteria for admission, refining the process and for implementing approved changes such as:

- Developing guidelines for a portfolio of information from each candidate;
- Reviewing and identifying criteria for admission (see below); and
- Requiring CPR basic certification as a condition for admission.

While there was extensive support from funeral directors and students for the inclusion of interviews in the admission process, we do not recommend this for implementation at this time. Support for including interviews focused on the need to interact directly with individual candidates to determine their character, motivation, understanding and commitment to funeral service. Opposition to conducting interviews focused on time, costs, subjective impressions and the need to train those involved. Further study, professional support and training would be required to ensure that relevant parties conduct interviews at a highly professional level. We suggest reconsidering this option at a future date. See appendices for further details.

A-2 Continue to actively recruit and admit candidates who have formal credits or practical and related experience beyond the minimum requirements in the following areas.

Communication
- Written
- Oral
- English
- French

Computers
- Technical skills
- Word processing
- Business practices
- Multi-media software

Business
- Accounting
- Basic business practices

A-3 Develop guidelines for Funeral Directors outlining preferred practices regarding the following:

- Aspects of the candidate's and intern's observation and training period, especially those matters relating to the preparation room;
- The completion of tasks in the pre-admission process using a minimum of forty hours;
- Ensuring that a highly professional approach is used throughout the pre-admission and intern process especially with regard to confidentiality; and
- Updating general information about the funeral service profession, which could be used in orientation sessions, public seminars and secondary school guidance classes.

B. ACADEMIC PROGRAMME

Background on the evolution of the Funeral Service Education Programme[7]

The new programme at Humber College in 1968 replaced that offered since 1937 by the Canadian School of Embalming ("CSE"), located at the Banting Institute at the University of Toronto. Before the CSE was established, attendance in a recognized school was not required for aspiring licensees. After 1937, the Board of Examiners (the present BOFS) required the candidate to obtain employment in a funeral home, register as an articled student, complete an apprenticeship of 24 months, attend the CSE, and pass the examination set by the Board of Examiners. If successful, the student was granted a licence at the end of the apprenticeship.

Beginning in 1948, students were required to attend classes at the CSE for two months – one month in each of their two years of apprenticeship. In 1962, four more weeks of study were added to the CSE program. The practice of first obtaining employment and then articling was maintained until 1973. In 1950, after years of lobbying provincial cabinet, the formal education requirement was raised from Grade 10 to Grade 12. Nevertheless, debate within the profession about whether to raise this requirement beyond Grade 12 carried on well into the 1960s.

By the late 1940s, the CSE curriculum included anatomy, bacteriology, elementary chemistry, pathology, sanitation, public health, embalming, restorative art, and funeral directing. In 1959, the programme was broadened with the addition of personality development and the St. John's Ambulance standard first aid certificate. (For many years, some funeral directors provided ambulance services, especially in rural Ontario – their vehicles' size made them the natural choice.)

Faced with growing enrolments in the mid-1960s, the University of Toronto indicated to the CSE that the Banting Institute would be no longer available to them and the CSE was faced with a choice of either purchasing or leasing new facilities elsewhere. The advent of the first Community Colleges of Applied Arts and Technology in 1967 in Ontario ("CAATs") provided an opportunity to relocate the programme within the context of a new concept for post-secondary education. After discussions between representatives from the Board of Administration and Humber proved fruitful, Humber College was chosen as the new site, with the first class being held in September 1968.

When the programme was moved to Humber in 1968, although the curriculum included additional non-technical subjects, including psychology of grief, the curriculum generally followed the CSE outline until 1973. The first classes of 30-35 students, started at the Queensway campus in September 1968. In the early days, much use was made of visiting/part-time instructors for lab work (University of

[7] Interview with Don Foster; John R. Finn, op.cit.

Toronto anatomy instructors, off-season, in a small lab at Queensway) and for grief psychology (church ministers). At first, the CSE schedule was followed, but by 1969, the course of study grew to 14 weeks. In January 1971, the programme was moved to its brand new facilities at the North Campus where its stands today – at the time it was the only accredited programme in Ontario and the only funeral service education programme with its own facilities in Canada.

Lengthening and extending the course requirements was again on the agenda in 1971, leading to changes that, with minor modifications, formed the model in place today. After much discussion of four proposed models, in 1972, the Board of Administration approved the present format of the program – requiring full-time study in the college for one academic year (two semesters) followed by a year of apprenticeship. During the apprenticeship (internship) year, students were required to complete a number of Humber assignments, in addition to their funeral home tasks. Following completion of the apprenticeship (internship), students would return to Humber to prepare for the Licensing Exam. Because the requisites of training were spelled out in the *Embalmers and Funeral Directors Act*, changes had to be made to the legislation. The new curriculum was implemented in September 1973, after much consultation. The requirement that students had to be employed before entry was dropped and applications were no longer vetted by the Board; henceforth they would follow standard community college requirements.

Some funeral directors resisted lengthening the course of study because they did not want disruption to the "work flow". Other funeral directors simply saw no need for academic preparation at all, and saw the apprenticeship (internship) as more than sufficient as a learning experience. The Advisory Committee (carried over from the CSE) was reluctant to endorse the new programme because its members did not want to face flack from disgruntled funeral directors.

The progression from part-time instructors to college-based instructors in non-technical subjects was supported by the growth of Humber programs in health sciences (e.g., anatomy, microbiology), liberal arts (ethics, psychology), and business. One recurring problem with college instructors who were not funeral-service based was that they often did not apply or adapt the course content to a funeral service context, prompting student criticism of irrelevance and too much material to "digest".

Over the years, Humber's programme developed a reputation as a leader in technique. For 13 years, the Humber staff ran a truncated programme in Alberta initiated by an Edmonton-based funeral director, including on-site instruction and correspondence courses. In 1990, the Humber curriculum was sold to Kingstec Community College in Nova Scotia. On a continuing education basis Humber offered a correspondence course for transfer service operators and a post-diploma programme for Palliative Care.

To help Humber curriculum developers get a wider focus and an up-to-date reflection of funeral service requirements, a technical committee of 12 funeral directors spent three days in 1993 developing what is called the DACUM task analysis. DACUM is an acronym for "Developing a Curriculum." Ninety funeral directors validated their work. College staff was not part of the first stage of the process; in the second stage, staff reviewed and validated the results and adjusted academic programs. Boréal staffers employ a similar task analysis approach. The DACUM process, as applied to funeral service, defined 10 areas of general competence each supported by a varying number of skills. Only desired behaviours were determined in this process, not knowledge or content specification. The ten areas of general competence as defined by the DACUM process were as follows:

- Arranges Funerals, with 15 skills
- Embalms Bodies, with 33 skills
- Caskets Body/Remains (Presentation), with 9 skills
- Directs Funerals, with 14 skills
- Performs General Operational Duties, with 25 skills
- Performs Administrative Duties, with 31 skills
- Maintains Facilities and Equipment, with 6 skills
- Provides Post Funeral Care, with 8 skills
- Performs Public Relations Activities, with 10 skills
- Maintains Professional Currency, with 7 skills[8]

Later on, we will return to the DACUM study and its relationship to the curriculum and the internship process.

The Humber Advisory Committee (HAC) for the Funeral Service Education Programme, composed of representatives from the BOFS, OFSA, funeral directors, the public, and College staff and administration, has met semi-annually since the inception of the Humber program. The Committee's aim is to connect staff with important stakeholders and to discuss developments and issues related to the programme. The minutes of HAC meetings indicate that many of the issues that research participants for this study have identified have also been on HAC's agenda for at least a decade, if not longer. This indicates that many issues such as overload and balance are not new, but rather, like many "problems" in education in general, they need to be revisited.

For example, HAC struggled in the mid-1980s with a series of cuts to instructional time because of contract and cost concerns. These cuts would continue into the 1990s, reducing the mid-1980s instruction load from 27 hours per week to its present 24.5 hours per week. The erosion in instructional hours promoted discussion within HAC about extending the academic period. Extending the academic period of study was also on the agenda because of growing concerns about a course load that was growing to meet newer demands for coverage. Some of these demands came from

[8] For a description of the process and the specific skills, see DACUM, Developing A Curriculum, 1993, by Rick Embree, Humber College of Applied Arts and Technology

Ministry policy that required all college students to carry general and generic courses in addition to specialized ones.[9]

Some of the demands came from pressure to augment the technical courses with those from social sciences and business management – that funeral service education should aim to develop a broader range of knowledge and skills. Students began to complain about having to absorb too much material in too little time and that breadth of coverage compromised depth. In 1989, a proposal was put forward to HAC for adding another full academic year (two semesters) to the programme but consensus for this proposal could not be reached.

A group, composed of 25 Humber students, presented a list of concerns to the HAC. These concerns about the academic programme were addressed by the HAC in January 1991 and included the following:

- Improving communication/writing skills
- Enhancing interpersonal skills/work ethic and attitude
- Determining qualities/characteristics best suited for the programme and profession
- Quality and length of pre-programme observation time
- More experience with embalming and funeral arrangements
- Enhancing skills related to cosmetics/hairdressing/reconstruction
- Addressing the counseling role
- Expanding knowledge of legislation and (pre-paid) contracts
- Knowledge of infectious diseases control and self-protection
- Acknowledging increasing cultural diversity and its implications for the curriculum and the profession
- Potential to establish or designate funeral homes for teaching purposes
- Models of bereavement

We know an effort has been made since 1991 to insert some of these areas into the curriculum but given the course load and time constraints, this has been largely on a piecemeal basis.

A more recent survey of issues/concerns about funeral service education is the OFSA Education Committee's 1997 survey of managers/owners on student/intern issues. Some of its main findings echo those discussed within HAC and the 1991 student group:

- The 40 hour observation format is not adequate to assess a candidate's potential;
- Too many weak candidates are getting admitted;

[9] The College Standards and Accreditation Council: The Report of the CSAC Establishment Board to the Minister of Colleges and Universities, July 1992, Richard Johnston and Bernard Shapiro, co-chairs. Toronto: Author

- The personal interview should be reinstated;
- The academic course at Humber provides a good foundation, but wide coverage means little in-depth study can take place;
- Extending the programme by at least a semester is advisable;
- Non-technical subject coverage should be extended, especially for business, marketing, communication, and computers;
- Revamp the intern programme to ensure that Humber gives greater support to students and funeral directors; and
- Improve the information package explaining the academic programme and profession.

Since that survey was completed, the guidelines for pre-admission observation have changed from 40 hours to a task-based format. New material has been written and distributed that explains to potential candidates the scope of the academic programme and the expectations of the profession.

With this background about the evolution of funeral service programmes and some of the issues that various stakeholders have raised about them, we now move to consider the present academic programmes and what this study's research participants (students, interns, funeral directors, managers, owners and staff) have to say about them.

Present Academic Programs

The Humber programme, like that of Boréal, is a two-year programme, which includes one year of academic study and one year of in-service training in a funeral home. During the period of in-service training (known variably as internship or apprenticeship), students complete two courses in a distance education format. At the end of the second year, students return to the college for a final two week session to prepare for and write a licensing exam administered by the BOFS. In the 1999-2000 class at Humber, one half of students were women, capping a steady trend towards a gender shift in enrolment (and by extension, the future profession) that began in the early 1990s. The programme combines a study of sciences, business, social sciences, and law and ethics.

Key Performance Indicators ("KPI") Results Profile for the Humber Funeral Service Education Programme includes graduate employment rates, median starting salary, and graduate and employer satisfaction. For 1997-1999, the Humber Funeral Service Education Programme scored high among other Schools of Health Science programs and higher than overall Humber College scores except for one item relating to the perception by students of whether the programme provided them with learning experiences that would be useful in their lives outside of work.

sufficiently adapted to the specific context of funeral services. This has been a perennial complaint.

Students perceive the academic workload as highly intensive – "crushing" was a word heard often. Several students with university backgrounds remarked that they never had to work as hard at university and we have no doubt as to the validity of their remarks. One funeral director pointedly remarked that students only go to class for 22-25 hours a week and he wondered what they did with the rest of their time. What was overlooked is that weekly homework and assignments frequently meet or exceed in-class hours. Several courses require at least 3 hours of homework for every hour of instruction. There is also transportation time, part-time work, and juggling the demands of living in general. The average course load in other Humber programs is 18 hours per week. College staff, particularly at Humber, with staff-student ratios fixed by college policy, are pushed to the maximum with teaching assignments, marking, trouble-shooting, "administrivia", crisis intervention and counseling.

Given the academic crush, discussions about adding subjects or putting greater emphasis on newer subject areas should start with the acknowledgement that adding to the programme means either taking away something or amending what is already on the agenda.

Respondents had many suggestions for topics or subjects that should receive greater emphasis: embalming theory, arranging funerals, directing funerals, forwarding and receiving remains, typing/computing, the *Cemeteries Act*, ergonomics and personal safety, multiculturalism and its impact on funeral cultures, future issues facing funeral service, social issues that affect funeral service including common-law relationships, same sex relationships, business (the basic running of a company), and grieving issues.

The above list of topics needing more emphasis is not exhaustive! The question remains: how to accommodate newer topics without turning the crush into an avalanche? Respondents had two main suggestions: reduce the length spent on non-core subjects by paring the details down to what is specifically needed for funeral service, and/or by lengthening the academic year by at least a semester.

While some thought that non-technical subjects should take precedence in the curriculum, others asserted that what is needed is a careful balancing of knowledge and skills in the various aspects of funeral service. Those aspects include the following: technical, interpersonal, and business, and procedural, because the "real world" of funeral service requires a mastery of several interdisciplinary roles.[11]

[11] American Board of Funeral Service Education: feedback from industry suggests less emphasis on hard sciences, more on social and business sciences and selected areas in pre-need marketing, management, and regulation. (www.abfse.org)

There was widespread agreement that the technical skills associated with embalming remain central to the role of funeral director. However, the traits and skills listed in the following paragraphs were identified as needing more attention during college training and internship.

All respondents emphasized the importance of good interpersonal skills for the effective funeral director. Students identified the need for more interaction with 'real' funeral service people during training, as opposed to 'just working with fellow students'. They confirmed that the advantage lay in the clarity of feedback and the affirmation of professional standards and expectations, which were not available from other students or volunteers.

Funeral directors confirmed that many students were not 'mature' enough or skilled enough to allow them to engage clients directly. Some funeral directors invited students to sit in or even conduct arrangements under supervision; many others were not comfortable allowing students to be present.

Funeral directors cited the need for good team players who were willing to assume a variety of tasks, to work co-operatively and resolve problems as they emerged. Both students and funeral directors identified difficulty in relating to each other, particularly when problems emerged. 'Attitude' was most frequently identified as the main contributing attribute.

Employers strongly recommended that all aspects of communication skills receive more attention during training. Writing and speaking skills were identified as critical to the work of a funeral director.

Funeral directors identified the need for employees to develop a better understanding of the funeral business, the clients, products and the factors that impact on both value to the customer and to profit. There was some recognition that such understanding was related to ongoing professional development and to experience in the profession; there was also a strong feeling that the business related courses could help by linking content more directly to funeral services. Assignments during college and during the internship should be practically oriented, focused on various aspects of the business operation and interns should be engaged in appropriate activities that reveal the business side of the operation.

All recognized that many funeral homes do not yet make use of computer software available on the market. However, there was strong support for students to be trained on computers and to graduate with the required foundational technical skills in this area. In addition, it would be helpful to students to receive encouragement from funeral directors to learn their computer processes or to demonstrate any skills they have acquired during internship.

Comments from funeral directors in the focus groups often identified the attributes of excellent candidates. These invariably included references to maturity, responsibility, industriousness, flexibility, cooperativeness and good personal skills. Excellent students were identified as possessing superior communication skills, being capable of organizing their time and completing their work, and working well with others. They had the ability to anticipate and solve problems.

Students likewise identified feelings of gratification and satisfaction when their supervisors recognized these behaviours. They suggested that opportunities to apply these skills would be very welcome and would serve to motivate them towards increased commitment to the service and the profession. While students recognized that they would be expected to perform menial tasks (washing cars, sweeping parking lots, cutting grass, etc), they valued the efforts of those funeral directors who engaged them in a fuller range of experiences.

For students and interns, the closer to the "realities" and standards of well run funeral homes, the better. They were not happy with simulations that had the air of artificiality about them. They welcomed the visits of funeral directors to the college for special demonstrations and secondments and wished they had more of them. Some respondents thought certain funeral homes could be designated as teaching centres. Several funeral directors indicated their interest in college visits and secondments.

We found that most directors recognized that college programmes and internships should aim to provide an opportunity to master foundational knowledge and skills; they also recognized that the refinement of these skills continues throughout their years in the profession and through post-graduate studies.

We were impressed with the way the Boréal programme addresses the issue of character and attitude. The staff stresses the concept of 'Professional Image' in a number of ways. Much of the orientation course is dedicated to describing the attitudes and behaviours – including appearance and dress – that are valued in funeral service. 'Professional Image' also emphasizes the building of interpersonal and problem solving skills. 'Professional Image' is built into student evaluation: 10% of the grade for each course is reserved for professional attributes that students are expected to demonstrate. Boréal staff engages in conferences with students on a monthly basis to ensure that the 'image' message is understood. They also recognize that the smaller number of students allows for greater individual attention.

We discerned that college staff needed and welcomed the active support of the BOFS and OFSA. Any changes to programmes that involve restructuring, rescheduling, and additional costs may not meet with favour from college administration, and the BOFS and OFSA should be prepared demonstrate their support and shoulder some of the cost implications attached to changes. Several respondents suggested that if the present community colleges did not respond to the educational needs of the profession, other alternatives such as other colleges, private institutions, or a university context should receive consideration.

Our conclusions about academic programmes

In most focus group sessions we heard a remark attributed to some funeral directors who approached students with: "I know you're a college student, but this is how we do things in the real world!" For some funeral directors, practical "in-house" standards, as defined by them, are the only standards that matter. For others, a better fit is needed between applied theory (college) and practice in the funeral service setting. This illustrates a significant gap between college training and funeral service experiences.

In fact, students and interns reported a gap between expectations in college courses and the expectations of funeral directors. Some, in both settings, were quick to find fault with the others; we found limited support for the idea of shared responsibility and mutual dependency for the attainment of educational goals. Students and interns sometimes found themselves caught in the middle.

To paraphrase an over-used saying of the 1990s, if it takes "a whole village to educate a child", it takes the colleges, funeral directors, the BOFS, and OFSA working in concert to educate the funeral service professional, from academic preparation to internship to professional development. The attainment of educational goals requires recognition by various institutional actors of their mutual dependency rather than a focus on their autonomy. Mutual dependency requires on-going cooperation, the evaluation of the entire educational process and a close examination of the results achieved. The changes that we suggest, for academic programme and internship, need to acknowledge the principle of mutual dependency.

Recommendations for change also need to address the issue of the "crush" – the pervasive sense that students in the present structure are pushed to absorb too much information in too short a period. For many, this leads students in the direction of a superficial understanding of knowledge and skills, not a solid foundational grounding in the technical, interpersonal, and business and procedural aspects of funeral service education.

Balance in curriculum is also an issue that needs emphasis. We agree that more attention needs to be paid to "non-technical" subjects and the building of competencies in interpersonal skills and problem solving. We stress, however, that more focus is also required on the technical aspects of the profession. A solid grounding in funeral service means that students should master the knowledge and skills taught throughout their education in funeral service. These are introduced in the academic programme, continued in the applications and enriched in internship.

The first element to consider at this juncture is what an extended programme would look like – the lengths of the academic and internship parts. We briefly describe three models for extending the academic period and internship periods. The summers in the three models are "off" for students – most need to work during the summer to pay

for their education and all need to "recharge their batteries." In all models, students would still be required to complete correspondence courses during internship. Each model retains the "Spring Semester" idea; after internship, students return to college for at least two weeks to refresh their knowledge and prepare for the licensing exam.

Model 1: This model is based on the 1989 proposal for the Humber programme mentioned above. This concept adds two full semesters to the academic year in Year II with an average teaching load of 21.5 hours per week, for a total of four semesters in the academic programme. The internship would remain at twelve months and would follow the second academic year. At the end of the internship, students return to the college for two weeks. The total academic programme and internship would be four semesters plus twelve months internship and a spring session.

Model 2: This model would add one semester to the academic programme and one semester to the internship. Students would attend the academic programme for two semesters in Year I, one semester in Year II, and follow this up with a three-semester internship. The total academic programme and internship would be six semesters plus a spring session.

Model 3: Some research participants suggested a more radical restructuring along the lines of the co-operative model. According to the Canadian Association For Co-operative Education (CAFCE, HYPERLINK "http://www.cafce.ca" www.cafce.ca) a co-operative education formally integrates a student's academic studies with work experience in co-operative employer organizations. Students alternate periods of work-based experience with academic study, typically on four or six month intervals.

Six criteria are critical elements of the co-operative approach:

- Each work situation is developed and/or approved by the co-operative educational institution as a suitable learning situation.
- The student spends more time engaged in productive work rather than merely observing.
- The student receives remuneration for the work performed.
- The student's progress on the job is monitored by the co-operative education institution.
- The student's performance on the job is supervised and evaluated by the employer.
- The total work experience is normally fifty percent of the time spent in academic study, and in no circumstances less than thirty percent.

A sub-group of CAFCE, Co-op Ontario (http://coopont.mohawkc.on.ca/) has a membership of over 200 co-op educators with more than 31,000 co-op students at 21 colleges and 15 universities. While many are familiar with the University of Waterloo's efforts in co-op education in the 1960s beginning with engineering and computer science, Co-op Ontario's web site indicates that the range of programmes in this province now encompasses the liberal arts, sciences, applied sciences, technology,

veterinary studies, electronics, child care, (applied) health sciences, social sciences and architecture, just to mention a few. Despite its popularity in Canada and the United States, it has not yet been applied to funeral service education programmes.

According to research participants, the biggest drawback of the co-operative model is that the alternating sequence of study/work would impede the continuity of learning experience for the students. In addition, many funeral directors do not welcome what would be a serious disruption of "work flow". We were also told that smaller funeral homes with smaller staff in particular tend to rely on interns to perform a varying range of tasks and that such tasks could not be limited by a predetermined sequence of tasks. We were told that the co-op approach for study/work would prove an additional disincentive for funeral directors who accept interns, a pool which has been steadily shrinking over the years. In the final analysis, we found these arguments against a full co-op model compelling.

Some features of co-op learning are already evident in funeral-service intern programs. However, one particular feature is worthy of further development: the on-site work experience based on the identification of core competencies. For the colleges and funeral directors, learning from the co-op approach offers an opportunity to exchange and support each other in the development of exemplary practices and standards. We think that such an approach would help alleviate some of the biggest concerns raised by research respondents about the theory-practice gap, the competence levels of graduates, and the degree of cooperation between colleges and funeral directors.

That being said, we lean towards Model 1 – expanding the academic programme by adding at least one semester. We recognize that important learning takes place in both academic and internship phases and that the increase in the length of one should be balanced by a review of assignments and activities in the other. Fundamental changes need to be made to improve both the content of the curriculum (see Employability Skills in Appendix) and the nature of the internship.

We note that the recent partnering of Humber College with the University of Guelph to create a new centre for degree-granting status has stimulated speculation about whether funeral service should follow the route taken in Ohio and Minnesota that requires funeral service professionals to obtain a specialized university degree. As the cover of the April 2000 edition of The Director, the official publication of the USA based National Funeral Directors Association, puts the question: "Is a Baccalaureate Just a Matter of Time?" While we would welcome the development of a degree pathway for funeral service professionals, we tend to view it as just that – a pathway that some might use for initial accreditation and that some might follow part-time as a professional development option. We think that a renewed community college focus could serve the profession in a more responsive fashion and we share the concern that university entrance requirements would bar too many good candidates from the field.

In order to ensure that professional expectations as outlined in the DACUM study are aligned with what is taught in the academic programme, there is a need to outline the core competencies that correlate with the tasks in the DACUM study. This would provide focus and clear direction to staff, students and funeral directors who supervise interns. In its present state, the DACUM study fails to provide a comprehensive definition of standards that should be applied in judging degrees of competence, and does not delineate key personal competencies and broad business perspective competencies (see below) that we think are critical to the development of the funeral service professional. If the DACUM process is revisited, this should be kept in mind when the programme and professional standards are being defined.

A core competency may be defined as a set or cluster of skills that are essential to the effective performance of a major function in the profession. For example, many respondents confirmed that interpersonal skills, communication skills, problem-solving skills, and technical skills were essential for success in funeral service. Similarly, respondents confirmed the need for well-developed embalming skills in order to be judged competent to perform that central function. Such core competencies must be spelled out to provide clear direction for students, staff and funeral directors as well as the general public. (See Core Competencies in the Appendix to this section).

Research in the area of curriculum in educational institutions confirms that there is a renewed emphasis on specific outcomes, which are identified as core competencies. These are frequently assigned to three categories.

1. *Functional* competencies are those that relate to the unique value that funeral service professionals provide, such as mastery of embalming technique and arranging and directing. We have noted that many respondents are saying that they require a broader range of functional skills than perhaps was required in the past.
2. *Personal* competencies enhance the way individuals handle professional relationships and they promote an enhanced capacity to learn – communication skills are an example.
3. *Broad business perspective* competencies relate to the business context in which funeral directors work – such as strategic or critical thinking and integrating information from other disciplines that is useful in decision-making.[12]

This trend is reflected in the colleges with the current emphasis on specific outcomes and key performance indicators. There is also a recent requirement to outline core competencies for trades and professions to address federal requirements for inter-provincial labour mobility.

[12] See Paula B. Thomas, "The competency-based preprofessional curriculum: A key component of vision success" in Journal of Accountancy, New York, October 2000.

A similar trend is noticeable in the business sector. The Conference Board of Canada, through its Corporate Council on Education, has developed a profile of foundational skills for employability. The Council strongly suggests that preparing people for work or for employability is one goal of most educational institutions. The skills profile outlines necessary employability skills. (See Appendix)

This work has been replicated in the United States. These sets of foundational skills demonstrate a remarkable similarity and could be used as a basis for aligning funeral service education programmes across the provinces and states. It is essential that the technical skills and the specialized knowledge base be identified and added to these requirements. This could provide a basis for describing core competencies for the Funeral Service Academic Programme.

B: Recommendations for Academic Programme

The major focus of this section is the continued improvement of standards of education and training. While it is recognized that Ontario has one of the best programs for training funeral directors in this country, it is clear from the feedback that every effort must be made to continue to make improvements. The following recommendations are intended to build on the strengths of the current academic programmes and develop improved support and participation by funeral directors.

B-1) The Board of Funeral Services should work with colleges and with representatives of the profession to:

- Confirm professional expectations and describe the relevant competencies and standards of performance expected of students and interns;
- Clearly communicate professional expectations and core competencies to funeral directors, students, staff and the public;
- Report on achievement levels; and
- Recommend improvements to programmes as appropriate.

These competencies and standards should serve as a guide for standards in education and training and as an assurance of high service standards to the public. A revisiting of the DACUM process ("Developing a Curriculum") would help the colleges to identify the desired knowledge, skills, and behaviours (core competencies) that a revised curriculum should aim to develop.

B-2) The Colleges review current programmes and instructional practices with a view to improving the balance between the academic and the practical aspects of the education and internship.

The term 'practical' is intended to include the technical and the social skills, communication skills, business and problem-solving skills in addition to those skills that directly relate to funeral service.

B-3) Expand the academic programmes
After the proposed review of the academic programmes has been completed, it is recommended that the Colleges consider the need to expand the academic programme. The aim should be to incorporate additional courses/experiences and to ensure that graduates meet the standards established for success in the field of funeral service.

B-4) The Board of Funeral Services create the role of an Education Officer to fulfill coordinating, communicating, and other liaison functions with the colleges, interns and funeral directors and to assume other responsibilities as assigned by the Board.

Such a role would require, among other qualifications, an intimate knowledge of technical, interpersonal, and procedural aspects of the profession, an understanding of educational issues, and a commitment to educational excellence according to standards established by the profession. The Education Officer should, among other duties, lead a serious dialogue of a representative group of funeral directors and college staff to identify professional expectations and relevant core competencies to guide the renewal of curriculum and to structure the internship process.

C. INTERNSHIP[13]

The Guidelines

A quick review of the *BOFS's Apprenticeship Guidelines and Schedules for Training* (1997) provides a helpful start to understanding the internship process and the responsibilities of key players. The BOFS's Licensing Committee oversees the internship process – to ensure the quality of the training and development process. The *Guidelines* assert that it is the student's "duty" to learn the skills "of all aspects" of funeral services; it is the "responsibility" of the funeral director to "ensure" that the student is "instructed properly". The funeral director to whom the student is "articled" must be licensed, but not necessarily the owner/manager of the business.

The "schedule" divides the sequence and range of internship instruction and duties into four quarters, beginning in June and ending in April of the following year. The full range of 20 tasks that should be performed runs from removals (initial transfers), to final disposition. Included among the tasks that should be emphasized are: maintenance, reception, and assistance-related duties (first quarter); embalming and instruction in the business and procedural sides of the funeral home (second quarter); pre-arrangements and at-need arrangements (third quarter); and directing funerals "under supervision" as well as embalming with "minimal supervision" (fourth

[13] We agree with the OFSA that the words "intern" and "internship" are reflective of the growing professional nature of funeral services and that "apprenticeship" is reflective of a trades-based model. Given the general thrust of this *Report*, we think that intern/internship is the more preferable description.

quarter). The particular requirements of tasks related to embalming are outlined at length in the *BOFS's Embalming Guidelines*, adopted December 6, 1995.

The *Apprenticeship Guidelines* acknowledge that some students may require a greater degree of supervision than others and require funeral directors to report to the Licensing Committee and the Registrar those interns who prove incapable of "fulfilling" their responsibilities, including observance of professional dress codes as stipulated by the local establishment.

Issues Concerning the Internship

The internship process generated much discussion and written response from research participants – the opinions on internship follow in the Appendix to this section. Our general impression was that while some interns received the benefit of careful mentoring and participated in a full range of learning experiences, many did not.[14] Some interns had to endure what seems to be outright exploitation as a source of cheap labour. Too often, interns felt they were perceived as low-level employees for whom funeral directors would invest little time or energy. At the other extreme, interns were treated as "gems" to be recruited by the funeral home.

What seemed to be missing is an understanding that internship is one of the most important professional responsibilities of a funeral director. The goal is to ensure that a new generation benefits from exposure to on-site expertise and the aim should be to ensure a widespread standardization of skills among novice entrants. The main beneficiaries of internship should be the interns, the profession, and over the long haul, consumers.

Although some interns did rankle some funeral directors with an apparent unwillingness to do basic tasks, our general impression from speaking to over 110 interns at Humber and Boréal was that most of them expected to do both the "menial" and the more substantive tasks, from washing cars and clearing snow from parking lots to embalming and making arrangements. [15]

Interns are required by the BOFS guidelines to complete the "5 and 5" – that is, a minimum of 5 pre-need and 5 at-need arrangements. We are aware that this requirement has traditionally generated much resistance from some funeral directors who think that allowing interns to work directly with families is a gamble they are not prepared to take.

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[14] The "unevenness" of the intern experience is not limited to Ontario. See, for example, "Iowa Preceptor Training Programme Gets Results" in *The Director*, November 1997, pp. 40-41; and "Who is Training Generation Next?" in *The Director*, April 2000, pp. 42-44.

[15] Many interns did not complete the surveys and their opinions are not tabulated in the mix. Our hunch is that they considered their hours with us in focus groups sufficient to inform us of their opinions.

The BOFS's Interim Intern Progress Report (March 16,2000) reveals that this resistance is still strong, as only 58% of 1999-2000 interns participated in at-need arrangements and 42% were allowed between 1 to 5 arrangements. (At the time of the Interim Report, the interns had completed approximately seventy percent of their internship.) Most interns got the opportunity to observe arrangements being made. For pre-need arrangements, 46% of interns did some form of pre-need arrangements and 35% of the total interns did between 1 to 5 pre-need arrangements. In other words, a large percentage of interns had done neither pre-need nor at-need arrangements. Our perusal of interim reports from the 1990s indicates a similar pattern. We were told that some funeral directors are even reluctant to let licensed graduates "work with 'their' families" to make arrangements. On the other hand, the vast majority of interns seemed to have no problem reaching the BOFS target of at least fifty embalmings. However, in order to become licensed, every student must sign an affidavit swearing that they have completed minimum requirements of arrangements, funerals and embalmings.

A truncated learning experience – one that ignores the fourth quarter of the *BOFS Guidelines*, which covers arrangements and directing funerals – creates, in effect, two classes of graduates. One group benefits from a full range of experiences under a careful tutelage while another does not. One group's wide experience qualifies them as novice *funeral directors* while the other group's experience qualifies them as novice *embalmers*, at best. We heard from many funeral directors that they did not wish to return to the days when dual licences were the norm – one for funeral directors and one, of lesser value, for embalmers. But, the practical effect of the inequity in intern experiences amounts to about the same result – two categories of graduates whose foundational preparation is qualitatively different.

There is a curriculum connection to the qualitatively different learning experiences of interns. The DACUM study undertaken at Humber (see Academic Programme) identified through a task analysis a full range of work related behaviours valued by Ontario funeral directors. These tasks parallel, in greater detail, those identified in the BOFS *Guidelines* for internship. The purpose of the DACUM study was to help Humber staff develop curriculum that reflects current professional expectations and standards. Judging from what we have heard on this issue, we can only infer that the DACUM task analysis is a reflection of "ideal" professional expectations that a large percentage of funeral directors do not think are necessary to pass on to a new generation. If arranging and directing are not valued as core tasks for interns, why then should these topics receive coverage in the college curriculum? We answer emphatically that they should be taught, and taught well, if the goal of education is to develop novice funeral directors, not just embalmers!

In the American funeral service context, the University of Minnesota's John Kroshus, in *The Director*, April, 1998, makes the argument that the validation of a curriculum requires not only "construct validity" (the curriculum is faithful to professional standards) but also "content validity" (what is actually taught reflects professional standards). We would argue that because the internship programme is an extension

of curricular goals, professional standards need to be consistently shared and demonstrated among the profession (especially those working with interns) in order to have any meaningful impact on the collective learning experience of interns. Funeral directors need "to walk the talk" on a more consistent basis!

We heard concerns about the lack of placements for interns. According to Humber statistics[16], in 1999, 87% of students got placements as interns and similar figures were expected for 2000. According to BOFS data, in 1999, 15 students did not do the internship, and in 1998 (11), in 1997 (21), 1996 (9), and 1995 (9). Some funeral directors, supposedly, still refuse to accept female interns mainly because of "lifting" concerns – although at Boréal this has not been identified as a problem. Some funeral directors do not want interns because of the "hassle" and additional paperwork. Some interns forego internship because they cannot find a placement in the GTA and/or are unable to move to another town or city because of family or other considerations. Some have health concerns; and some have babies. Others simply have lost interest in the field and have dropped out. Although we were told that some students intend to take up an internship later, we were not able to track whether they indeed accomplish this.

While the record on internship is demonstrably spotty, if providing for a full range of learning experiences is a main indicator, there are success stories in funeral homes in every corner of the province. Attached to a couple of completed surveys we received were glowing letters from former interns who praised the role that funeral directors played at this important juncture. Words like "supportive", "mentor-relationship", "careful progression of tasks", and "trust- and confidence-building" give witness to positive director-intern relationships. Similar descriptions were also heard in most focus groups we participated in.

Significantly, these examples of what professionals consider as best practices include preparation in the full range of desired tasks. Equally important, we think, is the notion that a rewarding learning experience is defined in large measure by the quality of the professional and person-to-person relationship that is nurtured between expert and novice. For us, this underscores the importance of socialization as a key design variable in the formation of funeral service professionals *i.e.* the formal and informal inculcation of professional values and behaviours.

We also discovered that several funeral service firms have their own clear guidelines in place for ensuring that interns benefit from a clearly laid out sequence of tasks that comply with or exceed the full range of expectations as articulated in the BOFS's *Guidelines*. To us, this indicates that there is nothing inherent in the *Guidelines* that is demanding "too much" of funeral directors nor "too far a stretch" for most interns to perform. Rather, what seems to be the missing element is a step-wise plan within some funeral homes to guide the process and a willingness on the part of some funeral directors to execute it.

[16] Humber staff interview, May 18, 2000.

Interns made it plain to us that they would have welcomed more support from the BOFS and the colleges during internship, especially in a timely fashion when support is needed on-site. In some cases, support would mean helping to sort out difficulties with funeral directors considered unfair or exploitative (two interns used the phrase "slave labour" to describe their experiences). In its November 1997 *Newsletter,* the BOFS expressed concern that some funeral directors do not compensate their interns despite Board policy. Many thought that some external supervision was necessary to ensure that managers and/or directors were adhering to BOFS guidelines.

Given the above, it did not surprise us that there was substantial support for the idea of preceptors, funeral directors who would be supervisors of interns, chosen and trained for this task.[17] A preceptor is one who instructs or teaches. In a number of focus groups, participants emphasized that funeral directors who take on interns are "teachers too" – and we thought that this was a pithy summary of the nature of the funeral director-intern relationship. Like teachers in other educative endeavours, funeral directors need guidance as to the particular demands of the teaching role.

In Iowa, the preceptor course was established in 1995 in order to counter complaints about incompleteness in the training experience in funeral homes and because of frequent abuses of the process. The demands of the Iowa preceptor training programme are modest. As administered by that state's Board of Mortuary Science Examiners, the course is structured into three one-hour sessions dealing with a) internship registration procedure and responsibilities; b) personnel management; and c) an overview of all state regulations that affect funeral service. Anecdotal evidence suggests that the programme has greatly reduced the amount of complaints directed to the Board about internships.

Preceptorship is a tricky proposition, countered some, as it could diminish the pool of funeral homes willing to take interns. Some participants said that serving in such a function should have its incentives or some form of recognition – either in the waiving of annual Board fees and/or receiving professional development credits if a credit system is to be instituted. Many equated the notion of preceptor with structured form of mentorship. Several suggested that pilot projects would help to test the viability of the preceptor model. Many thought that rotating the placement of students in funeral homes of differing sizes and locales would enhance a more rounded understanding of field realities. We recognize that it would be advisable to develop preceptors over a period of time. (See Implementation Plan)

There was strong support for the value of good placements. Interns believe that placements helped them gain a wide variety of experiences, helped prepare them for the licensing examination and helped prepare them for their first job.

[17] The Iowa Board of Mortuary Science Examiners trains preceptors. See *The Director*, Nov. 1997.

However, many interns and funeral directors believe that the college assignments, which are part of the internship year, need to be focused on job-related functions, and be more practical and skill related.

C: Recommendations on Internship

C-1) Designate and train funeral directors who supervise interns as preceptors. Their efforts should receive recognition both as a valued service to the profession and as credit for professional development. The proposed Education Officer should play a leading role in supporting this process.

C-2) Conduct a collaborative review through the Colleges of the internship assignments to ensure relevance, practicality, support, monitoring and supervision. This is intended to ensure that the learning experiences meet Board and professional standards and that the personal and professional welfare of the interns is maintained.

D. PROVINCIAL LICENSING EXAMINATION AND NATIONAL AND INTERNATIONAL ACCREDITATION

Licensing examinations for professions set and maintain standards and prove that standards have been met. For funeral service in Ontario, the BOFS's Licensing Committee sets and presides over the examination that graduates of college programmes write after they have finished their internships and returned to the colleges to refresh their knowledge and to prepare for licensing. The licensing examination consists of multiple choice and short answer questions and a practical demonstration of competence in embalming. The practical component is completed in a funeral home where the assessment and supervision is conducted by a licensed funeral director.[18] In recent years, the BOFS has invested much time in rewriting sections of the exam to ensure the clarity and reliability of the questions.

Licensing Issues

In this section, we review issues related to licensing as identified by the participants in the focus groups, interviews and from the questionnaires.

Participants raised the following concerns:

- Not knowing the standards and /or criteria in advance. Some concerns were expressed about the practical part of the exam. Expectations about performance were seen as variable, reflecting differing perceptions by the

[18] In June 1998, 131 students wrote Ontario Board exams and 2 wrote the non-embalming exam (118 students from Humber and 13 from Boréal). 81% passed, a drop of 12% from 1997. 24 re-wrote in December and 20 passed. The Board renewed licenses for 2315 funeral directors in 1998 with 70% active licences; 6 active are not authorized to embalm. BOFS *Annual Report*, 1998.

examining funeral director of their role and variability in the cases worked on by the student.
- Preparation for the examinations (cram sessions) – there was a significant lapse of time since the college courses were taken and just a small time frame to re-learn course content.
- French language students responding to translated test items on the examination require additional time on the exam.

General areas of satisfaction

Participants expressed the following positive comments about the examination:

- Exam structure was seen as fair and balanced – multiple choice, short answer and practical
- Exam was viewed as the best way to certify funeral directors
- Exam was fair – it tested what was taught
- Exam was fair – it asked about the right number of questions and was about the right length

Mobility and accreditation

Participants made the following comments about mobility and accreditation:

- Candidates and graduates would like to be able to write both Canadian and American exams to improve their national and international mobility and open additional employment opportunities.
- Some form of external accreditation is desirable for Ontario graduates.
- Most thought that the accreditation process in Ontario was fine as it is.
- Support for a graduated licence was extensive, but not unanimous – i.e. 2 yrs. experience before being granted a permanent licence.

Research in the Area of Evaluation

Current research into the relationship between instruction and assessment confirms that the manner in which students are assessed affects their motivation to acquire the necessary knowledge and to develop the required skills. This is in addition to factors such as the relevance of the material, the instructional techniques used, the personal motivation to succeed, and the teacher-student relationship.

The important characteristics of positive assessment practices are as follows:

1) Students are assessed on what was taught and practiced;
2) The focus of instruction is on solving problems and accomplishing tasks that are like those solved and accomplished by professionals in the field;
3) Standards or criteria of success are public, shared with the learner, and are the focus of feedback;

4) Assessment occurs over time during which the role of the teacher is to help the learner improve;
5) Learning contexts are provided in which students show what they have learned under the same conditions that occur in real life; and
6) A hands-on exercise or problem is expected to be solved that produces an observable outcome or product.[19]

This form of assessment is referred to as 'authentic' for the simple but important reason that it reflects those performances that are part of the normal work of the professional in the field. Both instruction and assessment are authentic when the tasks in question are important in the profession. The feedback to the student clearly indicates how well he or she applies the skill compared to the professional standard. This type of assessment is designed to elicit the student's best performance, not just a pass or a minimum competence.

For this approach to be effective, the professional expectations and standards must be clearly articulated and performed during the academic programme and internship. Also, the knowledge requirements and a set of competencies (clusters of skills) must be outlined in the curriculum as a basis for instruction and assessment.

D: Recommendations on Licensing

D-1) The Board of Funeral Services should engage an expert in assessment to review the Board's current licensing practices, the nature and balance of current test items, the alignment with best practices in assessment, the focus on competencies and standards, alternative methods of generating test items in French and English, and the annual analysis and reporting of results.

D-2) The Board of Funeral Services should collaborate with the colleges to collect, analyze and report annually on the achievement levels of students and interns with reference to specific competencies and expected standards of performance.

D-3) The Board of Funeral Services should engage a programme evaluation expert capable of evaluating the various provincial educational and training programmes in the contexts of national reciprocity and labour mobility. This will determine each province's comparability with Ontario's standards and will identify those programs that fail to meet the Ontario requirements.

Where the qualifications meet the Ontario requirements, the candidate will be accredited and will be permitted to work as a licensed funeral director.

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[19] Tombari, Marin L., & Borich, Gary D (1999). Authentic Assessment in the Classroom, Prentice Hall, Columbus, Ohio.

Where the candidate fails to meet the requirements, the candidate may pursue additional training and/or education to meet the standard in the specific area deemed insufficient. The Board may consider partial or provisional licensing where appropriate.

D-4) The Colleges should continue to pursue accreditation of the two college training programmes with the American Board of Funeral Service Education and the BOFS continue to support this endeavor by the colleges.

E. PROFESSIONAL DEVELOPMENT

Issues

The opinion survey data shows that research respondents by a large margin support a more comprehensive and demanding professional development programme ("intensive"). Many thought the present programme requiring mandatory attendance for 1.5 days every 5 years had improved in the last few years but is still insufficient to meet professional growth needs[20].

By "intensive" most respondents meant a mandatory programme whereby funeral directors would be obligated to undergo some form of approved continuing education on a yearly basis in order to maintain their licence. In addition to this minimum requirement, some funeral directors currently voluntarily undertake some form of professional development either in Canada or in the US. In Canada, the Funeral Service Association of Canada provides a programme for continuing education and various provincial associations sponsor occasional institutes, seminars, and symposia that Ontario funeral directors may choose to attend.

Most respondents seemed to favour a credit system whereby the BOFS would approve credit offerings (especially distance education)[21] and sponsor local programming. Some hoped the colleges could play some role in programming for continuing education and/or professional development. A few maintained that present

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[20] BOFS Professional Development surveys for 1994-1999 include items to query participant preferences, suggestions and critiques of a broad range of speakers and workshops/seminars. In 1995, 73% of funeral directors preferred 1.5 days of PD per 5 years rather than 2 days but 1996/97 results showed some support for lengthening programme and covering topics in greater depth. Presentation skills of seminar speakers were scrutinized closely each year by participants. In 1998, 295 participants attended and 204 evaluations were made.

[21] On distance education and funeral service education, see George Connick's article in *American Funeral Director*, April 2000. He says the ABFSE should facilitate an educational structure that is easier to access, unconstrained by barriers of space and time, student-centered, and cost-effective. In the *Director*, April 2000, Joseph A. Marsaglia Jr. of the Pittsburgh Institute of Mortuary Science in Pittsburgh, PA, argues that mandatory continuing education is necessary because voluntary measures fail to generate enough participation "despite evidence that scrutiny from both the government and the public is increasing (p. 47)." Presently, 28 states require mandatory continuing education, with wide variance in yearly requirements.

programming is sufficient, and a few opined that they saw no need for professional development whatsoever. While some think that a more intensified system should be voluntary, many others in focus groups asserted that since many professions require mandatory professional development of members as a condition of retaining a licence to practice, funeral service should follow suit in the interests of accountability and credibility.

While the majority of respondents valued mandatory professional development, a number of arguments may be raised against a *mandatory* system.[22] Mandating continuing education may violate adult learning principles and punish those who participate voluntarily. Proving a connection between professional development and better performance is difficult. Programmes may not be consistently or uniformly available and finally, professionals should be accountable for effective performance, not participation.

Arguments for a mandatory system, some of which we heard from research participants, include: expecting voluntary participation is unrealistic; evidence suggests that well-designed programs can influence effective practice and provide equal access to a range of opportunities; and mandatory programmes serve a vital accountability function, in protecting the public interest, by assuring that practitioner knowledge is always current.

Well-designed continuing professional education programs are often described as having a number of characteristics:

- accessible, affordable, and of high standards;
- relevant to individual learning needs;
- designed for different learning styles;
- applicable to practice;
- viewed as part of the lifelong learning continuum;
- link practitioner competence to the ideals of public service and accountability; and
- consider the professional as an adult learner.

Well-developed continuing education programmes aim to develop three types of competencies discussed earlier in Academic Program: *functional* competencies; *personal* competencies; and *broad-business perspective* competencies[23].

Research respondents had suggestions for topics worthy of coverage in a more vigorous programme for professional development. The wide variety of topics seem to reflect a combination of personal interests, career stage, and roles within a funeral

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[22] See Sandra Kerka, 1994, *Mandatory Continuing Education*. ERIC Digest No. 151

[23] See Paula B. Thomas, "The competency-based preprofessional curriculum: A key component of vision success" in Journal of Accountancy, New York, October 2000.

home. They also reflect all three competencies: functional, personal, and broad business perspective. Some of the topics include the following:

- internships;
- ethics;
- technical improvements in the embalming field;
- communication skills to educate the public;
- presentation skills;
- managing in a family business;
- management issues – human resources issues such as dealing with disciplinary files and terminations;
- employee relations concerns – laws affecting employees and employers;
- new computer technology available to funeral homes to enhance and simplify book keeping;
- collections from difficult clients;
- product knowledge;
- women's issues in the industry; and
- legislation and legislative changes.

We agree with those who welcome a mandatory programme with yearly requirements and base our perspective on a number of ideas: professionalization of funeral service, professional responsibility and accountability, a rapidly changing business and social environment, increased mobility, and specialization.

We would argue that such a programme is consistent with the identified need to further *professionalize* funeral service education in Ontario, and is consistent with the expectations of most other professions in Ontario today – physicians, nurses, lawyers, engineers, certified public accountants, and most recently, teachers. All of these professions view a member's on-going involvement in some form of approved continuing education as a benchmark of *professional responsibility and a hallmark of public accountability* to ensure that the quality and integrity of professional service meets the highest standards.

Research participants identified a strong need to keep abreast of new ideas and to adapt to a *rapidly changing environment.* In our research we found that even though the basic technical elements of the work of funeral directors have been clearly defined for a number of years, innovations and new applications of products and techniques emerge regularly and many funeral directors indicated to us that they want more knowledge and skills in these areas. New trends are emerging in funeral service in North America and continuing education can play a role keeping funeral directors up-to-date on a number of them, including the following:

- the growth of funeral service chains and alternative service providers that place a greater premium on competitiveness;
- aftercare services;
- preplanning and prepayment of funerals;

- changing governmental regulations, especially in areas of occupational health and safety **(order switched from safety and health)**;
- more personalized services that differ from "traditional" approaches to funeral service;
- changing demographics requiring knowledge of and sensitivity to cultures and belief systems that funeral directors may be unfamiliar with; and
- the implications of increasing numbers of women and minorities entering the profession[24].

Professionals value *mobility,* and documented professional development helps individuals to demonstrate to prospective employers and licensing bodies that they have learned and re-learned in order to ensure that their package of competencies is as current as possible. Professional development also enhances an individual's ability to pursue *specialization* in areas close to their professional interests. According to research respondents, funeral service offers ample room for such specialization.

Professional development programs that are mandatory with some yearly requirements vary in terms of structure and demands. For example, Kentucky requires funeral service licensees to complete a minimum of 4 hours per year, and these credits cannot be carried over to the next year; and Arizona requires a minimum of 12 hours per year. Typically, states that have mandatory yearly requirements ensure the licensees' compliance by having them submit certification forms to the appropriate body (Board and/or its Continuing Education Committee) that reviews, approves, or verifies course offerings and does the data entry. This system works well if licensees send in their certification forms as soon as they complete a course – otherwise bureaucratic overload ensues.

We were impressed with the way the (American) Academy of Professional Service Practice ("APFSP") organizes its voluntary certification program, and here we provide a very brief summary.[25] To meet the requirements for the designation of Certified Funeral Service Practitioner ("CFSP"), licensees must earn 18 CEUs ("Continuing Education Credits") or 180 contact hours distributed among four categories: academic, professional activities, career review, and public and civic education. While no time limit is set for attaining the 18 CEUs, once licensees receive their designation they are required to earn 2 CEUs (20 hours) per year.

While the APFSP programme is voluntary, some of its features are worthy of consideration for a mandatory program: the idea of professional designation, the requirement of contact hours to be spread out in a weighted fashion among a number of categories, and the necessity of obtaining a yearly minimum of CEUs after

[24] For more information on American trends, see the website of the US National Funeral Directors Association, NFDA, http://www.nfda.org/about/index.html. Canadians recognize that many American trends of all descriptions tend to migrate north, sooner or later.

[25] Brochure. *Academy of Professional Funeral Service Practice—A Voluntary Certification Program.* No date. APFSP, P.O. Box 21-8141, Columbus, OH 43221, phone (614) 431-2377; fax (614) 431-5877.

designation in order to maintain the designation. We think that these features are worthy of emulation in Ontario. We do not think it appropriate, however, to recommend that the precise requirements of the APFSP programme, or those of any other program for that matter, be adopted without significant review and consideration by the appropriate committees within the BOFS.

Given the requirements of 28 American states in the context of mandatory programs, it is apparent that the yearly minimum is both variable and somewhat arbitrary. What is important, we think, is that the minimum requirement for Ontario should be *feasible* – within the capacity of licensees to pursue in conjunction with employment – and *adequate* – with sufficient quality and time requirements to ensure the credibility of the programme. Programming also needs to be *accessible* – in a large and multi-lingual province, licensees should not be impeded from participating in continuing education because of geographical or language concerns. The growth of distance education formats south of the border provides both a source of programming for Ontario licensees and a model for the development for Ontario and Canadian programming.

We think it appropriate that Ontario develop its own capacity for offering programmes to supplement what its members may choose to pursue through out-of-province continuing education offerings. The BOFS annually surveys its members as to their preferences for professional development. This survey could serve as a basis to firm up potential programme offerings, which could be organized and hosted by reputable providers. We also think that the colleges could provide a greater role in continuing education in Ontario. In many other programmes at the community college level, continuing education is emerging as a popular and often "leading-edge" feature. We are sensitive to the question of staff overload, which we outlined in the Academic Programme section above, and recognize the limits that can be placed on their time. We are not saying that staff should actually teach and organize a full continuing education programme, however, we think that staff in both funeral service programmes, in conjunction with the BOFS and OFSA, could agree on suitable course offerings and jointly sponsor seminars, workshops, and symposia of high quality that licensees would find relevant and timely.

E: Recommendations on Professional Development

Feedback on professional development confirmed that funeral directors appreciated the current programmes. Many funeral directors and employees expressed the need for more opportunities for professional development in their own communities and regions and they favoured an expanded set of requirements that could be pursued through a variety of courses and programmes for credit.

The following recommendations are intended to build on the existing professional development requirements, programmes and practices by:

E-1) Expanding the requirements and options for professional development over a period of time beginning, in 2001, by adopting a credit-based, mandatory system to be developed by a representative committee and approved by the BOFS. Such a programme could lead to a professional designation.

E-2) Approving programme and course offerings (basic and advanced) for professional development across four categories (academic, professional, career review, and public education and service) in a timely and efficient manner.

E-3) Identifying a representative Professional Development Panel to consider professional development programming needs that meet the criteria of feasibility, adequacy, and accessibility, and ensure that such programming is balanced among the range of functional, personal, and broad-business perspective competencies.

E-4) Directing the proposed Education Officer to play an active role in supporting the development of the mandatory, credit-based programme by identifying licensee needs, sources of programming, evaluating programme offerings, and assessing impact of continuing education upon practice in light of professional standards.

APPENDICES

Pre-admission	p. 44
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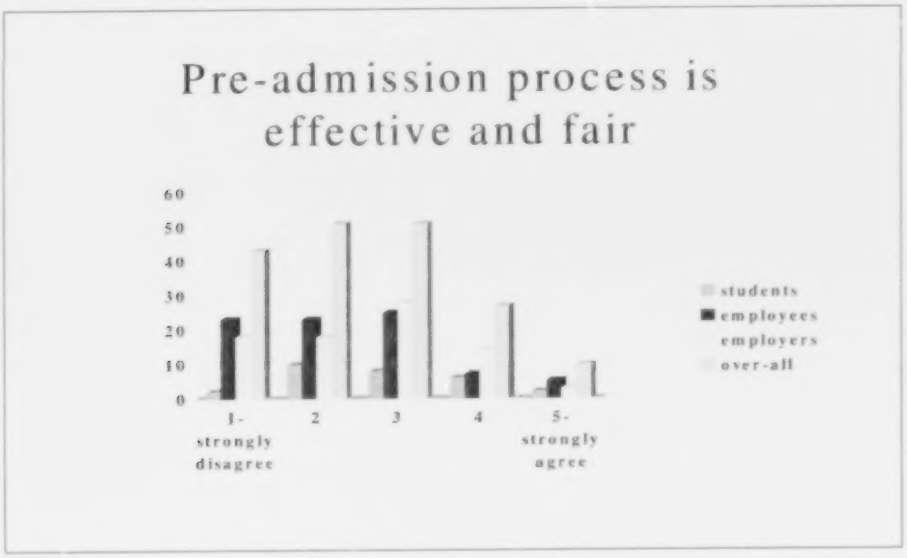
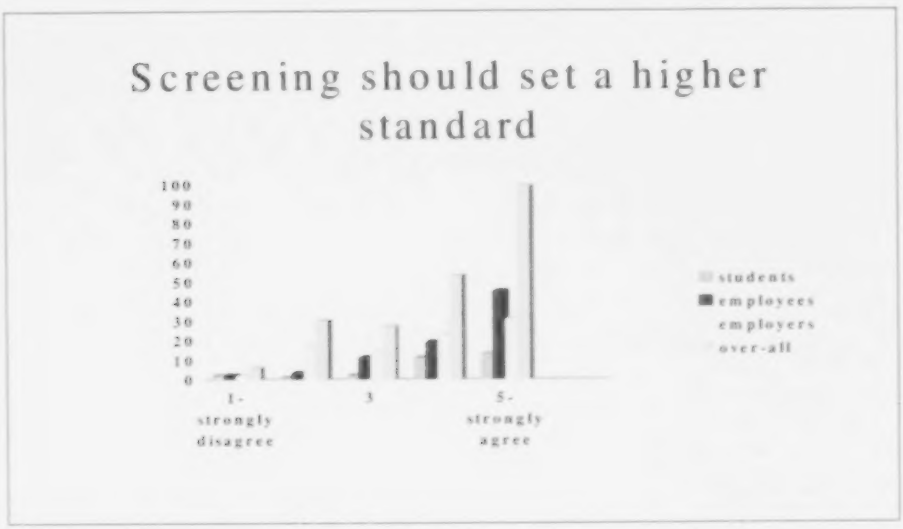
Note: All graphs in the following appendices display the total number of responses on the vertical axis. The horizontal axis displays the 5 point scale ranging from a low of strongly disagree to a high of strongly agree.

PRE-ADMISSION

The following graphs reflect the responses of groups of respondents in focus groups: students, employers, employees and an over-all. The representations provide an image of trends and directions. They are not intended to represent absolute preferences.



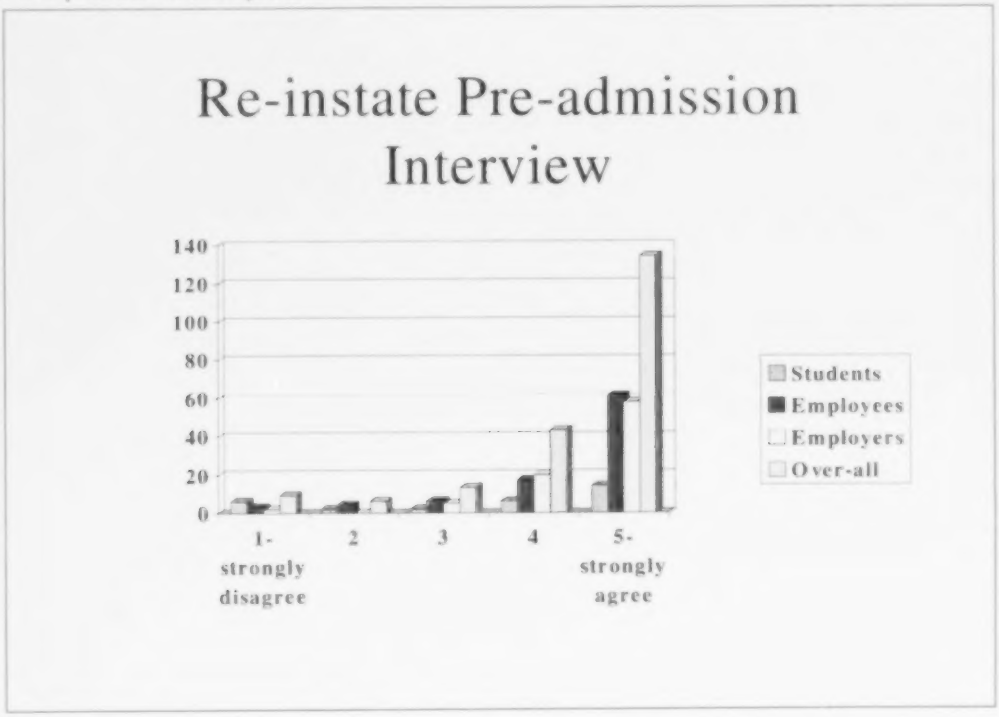
The trend among respondents was to disagree with the statement.
Many respondents believed that the pre-admission process could be improved.



Screening should set a higher standard – comments from respondents

- •BOFS should review college pre-admission requirements periodically
- •Funeral Directors should recruit suitable candidates more directly
- •Prerequisites should be raised to reflect the rising education level of clients and the public
- •Maturity, life skills, suitability and communication skills should be increased/ receive more weighting

The graph is a representation of the responses from students, employees, employers and over-all. There is a clear indication that respondents favour an interview as part of the pre-admission process.



1. Human Rights

The Ontario Human Rights Code, 1995, provides that every person has a right to freedom from discrimination in the area of employment, contracts and memberships in associations and unions. Prohibited grounds of discrimination include:

- Ancestry,
- Place of origin,
- Race or colour,
- Citizenship,
- National/ethnic origin,
- Religion/creed
- Age (18-65)
- Sexual orientation
- Marital status
- Family status
- Sex (including pregnancy or childbirth)
- Handicap (R.S.O 1990).

2. Professional Portfolios

A portfolio is a folder of information that is pertinent to the candidate's application. It contains information that illustrates and verifies the person's suitability for funeral service and is developed and maintained by the candidate. It may be presented upon application and it may be referred to in an interview setting as a source of additional information to be considered. The existence of a portfolio assists the admission process. A portfolio is evidence of responsible candidate behaviour.

A portfolio may assist you with an application and with an interview. Professional portfolios are playing an increasingly important part in the job search in many areas. The Manual for Student Portfolios at the University of Northern Iowa states, "All indications are that portfolios will become even more important in coming years. They are currently required for national licensure (certification) and may soon be required for state licensure, as certifying agents become less interested in the classes you have taken and more interested in who you are as a person and in what you are able to do".

The portfolio is now being used continuously from admission through to graduation and the job search. During college or university, it becomes the receptacle for evidence of growth in the required competencies and is used in conjunction with ongoing assessment and evaluation in each semester and practicum.

Alberta and Ontario faculties of education encourage the use of portfolios as a record of achievement, as evidence of growth as an individual and as documentation of growth and performance as a new professional in your chosen field. As such, it is a valuable asset for seeking initial employment, gaining promotion, or moving to a new opportunity. Many private sector businesses encourage applicants to provide a portfolio with applications.

Reference: Moffat, Wally, Getting The Job You Want, 2000. Toronto.

3. Examples of information that may be included in a portfolio

- Personal references and letters of support which describe the character of the individual;
- Experience statement which outlines and provides references for related work and volunteer experiences;
- A personal essay answering the question: 'Why I want to be a funeral director.';
- Samples of writing, work undertaken or tasks which relate to the skills involved in funeral services;
- Examples of community service performed by the candidate; and
- Anything the candidate believes will support the application.

3(a) Implementing Portfolios

Implementing portfolios would involve the following:

- Development of a full description of portfolios and their intended uses from a model from research or other professions;
- Providing a template or guideline for candidates to develop their own portfolio;
- Communicating the portfolio expectations to candidates, funeral directors and College Staff;
- Providing a guide with criteria for using and assessing information included in the portfolio; and
- Advising candidates that they have responsibility to prepare and present a portfolio containing information that supports the application.

4. Providing Personal Statements of Experience

Queen's University in Kingston requires a Personal Statement of experience and motivation to enter the Faculty of Education.

Guidelines provided to candidates include a request to describe the candidate's attributes:

- Commitment to the profession and to learning,
- Positive attitude to diversity,
- Communication skills,
- Leadership, and
- Special skills, experiences, circumstances, or recognition.

Further instructions about the written statement include the following:

- The statement must be written in essay form;
- The statement must be typed or word-processed;
- The statement must be prepared in your own words without professional help;
- The margins must be at least 2.5 mm (1 inch) on all sides;
- A maximum of two 8.5 X 11 inch pages must be used and any additional pages will be removed before the statement is read;
- The printer font must be no smaller than 10 point;
- Letters of reference or a resume must not be appended;
- Name and number must be included on each page; and
- The statement must be stapled to your application.

4(a) General Guidelines for Reading and Assessing Personal Statements of Experience

1) Reward well-written Personal Statements that are lucid and correct, where the applicant followed directions, that are specific rather than general in

describing experiences and that give the reader a good sense of the applicant.

2) Accept a wide range of experiences e.g. men's and women's, cultural, and ethnic and racial. Reward both quality and quantity of experiences.
3) Feel free to raise questions that arise at any time during evaluation with the group coordinator; however, every score shall be the product of the individual judgment of the evaluator.
4) Be aware of your own biases.
5) If, for any reason, you are uncomfortable evaluating a specific Personal Statement, give it to the group coordinator.
6) Do not evaluate the Personal Statement of anyone you know.
7) Do not reward specific academic accomplishments, as these are already rewarded the academic points.
8) Assign a numerical score, from 0 to 10; no fractions or decimals, please.
9) You should aim for a mean (or median) score of about 6. Please try to score about the same number of scores above as below.

Training is provided for those selected to assess Personal Statements. Supervision is provided by the group coordinator to ensure consistency across panels and teams.

Reference: Lyn Connock, Personal Statements: A Handbook for Evaluators, 2000. Queen's University, Kingston, ON, Canada.

5. Interview

Professions that deal extensively with people use the interview to afford the candidate an opportunity to present a personal profile that extends beyond the academic qualifications. Teaching, the medical profession, and nursing are but three where interviews are commonly part of the admission process.

Interviews are usually conducted using a combination of staff, professionals from the field and representatives of the public who may be involved in related professions.

Panels may be set up in several geographic areas in order to complete the interviews in a timely fashion. To ensure that the interviews are conducted in a professional and unbiased manner, training is usually provided, the process is clearly identified and the criteria laid out for the candidate, for panel members, the profession and the public. A representative of the profession usually chairs the panel and conducts the interview according to a common guideline. A comprehensive set of questions is prepared for all panels and includes model responses. Training focuses on proper questioning techniques, a fair and open process, opportunity for the candidate to speak to information in the portfolio, follow-up questions and probes, evaluating and summarizing the interview, submitting reports and recommendations. These safeguards are essential in order to ensure objectivity and avoid violating an individual's human rights.

Members of panels are initially provided with a description of their duties and are solicited from the profession, staff and the public. A pool of trained panel members is developed and one coordinator assigns individuals to panels and manages the communication with panels, candidates and the Colleges. After the initial year of interviewing, fewer panelists have to be trained as new members are introduced.

Panels may be made up of two to five people; ideally the number should not overwhelm the candidate and three is usually sufficient for the task. That number allows for a member of staff, a Funeral Director and a member of the public to be involved. Frequently another representative of the profession is used instead of a member of staff to alleviate pressure on staff members.

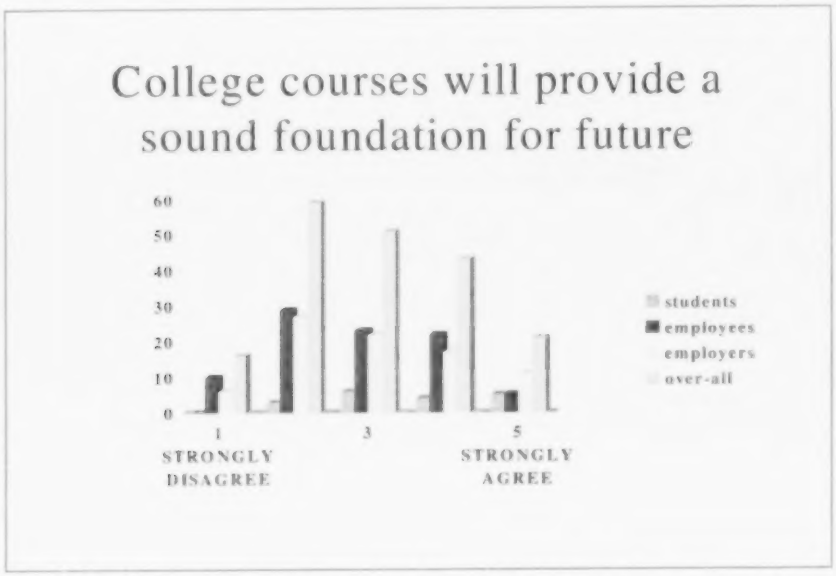
5(a) Implementing Personal Interviews

Implementing personal interviews would involve the following:

- Establishing a small Interview Panel Work Group to set out relevant criteria, describe the interview process, solicit members, and arrange training. An alternative to this approach would be to contract the work to experts in this field. Mature or retired Funeral directors might be surveyed to determine their interest;
- Communicating the expectations to candidates and providing a description of the process;
- Establishing panels and sites;
- Conducting interviews;
- Submitting reports and recommendations; and
- Reviewing and refining the interview process with feedback from candidates.

ACADEMIC PROGRAMMES

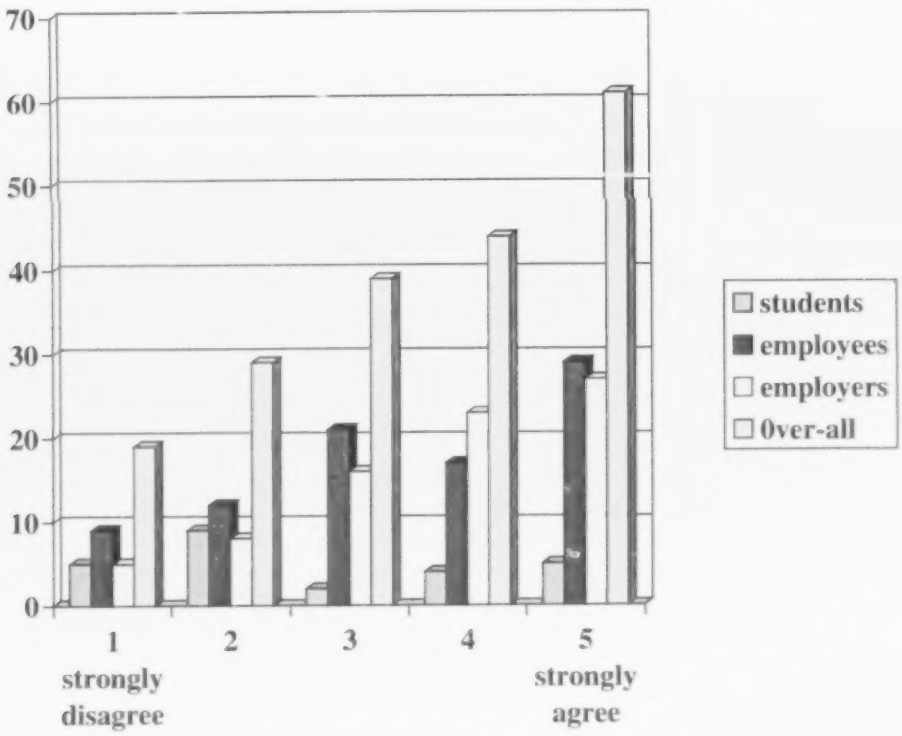
The following graphs reflect the responses of groups of respondents in focus groups: students, employers, employees and an over-all. The representations provide an image of trends and directions. They are not intended to represent absolute preferences.



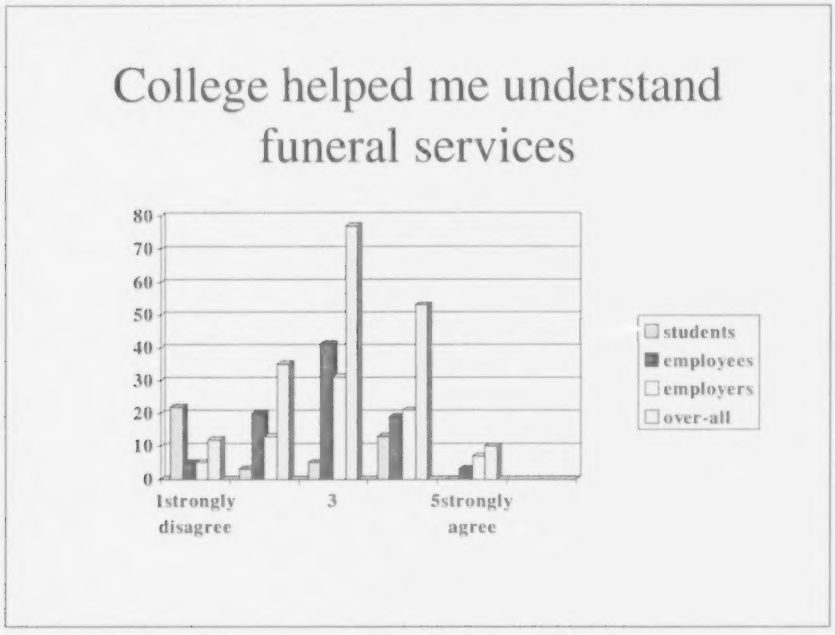
Despite a degree of support for this statement as it applied to 'technical' preparation, there was a belief that courses in the areas of computers, communication, ethics and business should receive more attention.

For a variety of reasons, (time to mature, time to broaden the courses and time to master skills) groups favoured the option of lengthening the time of the training for funeral directors.

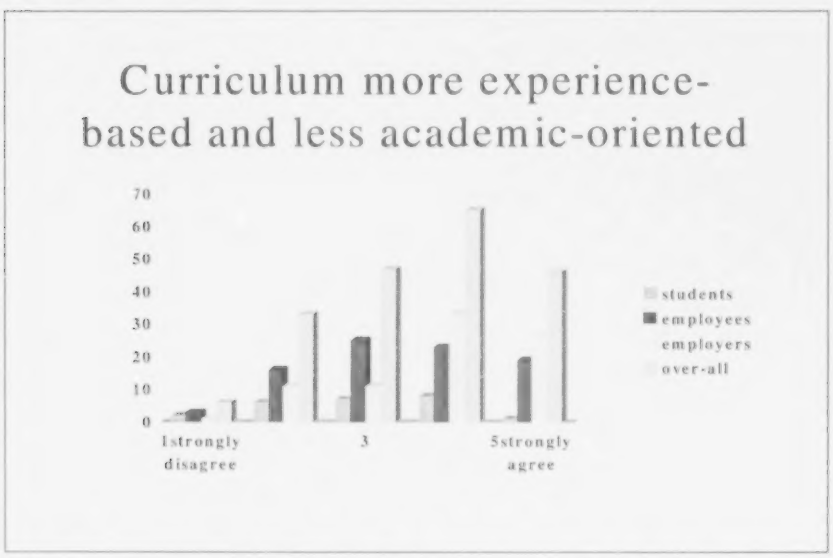
More emphasis on business, social and ethical aspects



There was no clear consensus among students as to what courses should receive more emphasis. This graph shows a desire for more emphasis on business, social sciences and ethical studies; discussions in focus groups ranged across the full spectrum and appeared to reflect personal interests.



More employees and employers than students believed that college training helped them understand the nature of funeral services. Many students were overwhelmed by the impact of their courses and were subsequently surprised by the realities of their internship.



There was strong support from all respondents to provide a better balance between the practical and the academic experiences.

Another way to pose the question of curriculum balance focused on the relationship between theory and practice.

There was strong support for improving the integration of theory and practice.

ROLE OF THE EDUCATION OFFICER:

Major Functions—liaison, co-ordinate, communicate, problem resolution, supervise, mediate.

Appointed by the BOFS.

Desired Qualifications – graduate of a funeral service education programme with a degree; minimum of five years experience in funeral services; experience in education as a teacher/researcher.

Additional—experience working in supervisory capacity acting in coordinating role; computer training.

Duties to include: coordinating activities across all major phases of the training of students including pre-admission, academic, internship and professional development.

Initial focus to be on: assisting with the development of the portfolio concept; assisting in the process of defining core competencies; and supervising interns and mediating any problems that may arise during internship.

1. Employability Skills Profile

The Critical Skills Required of the Canadian Workforce

1(a) Academic Skills

Those skills that provide the basic foundation to get, keep and progress on a job and to achieve the best results.

Canadian employers need a person who can do the following:

1(b) Communicate

- Understand and speak the languages in which the business is conducted
- Listen, understand and learn
- Read, comprehend and use written materials, including graphs, charts and displays
- Write effectively in the languages in which business is conducted

1(c) Think

- Think critically and act logically to evaluate situations, solve problems and make decisions
- Understand and solve problems involving mathematics and use the results
- Use technology, instruments, tools and information systems effectively
- Access and apply specialized knowledge from various fields (e.g. skilled trades, technology, physical sciences, arts and social sciences)

1(d) Learn

- Continue to learn for life

2. Personal Management Skills

The combination of skills, attitudes and behaviours required to get, keep and progress on a job and to achieve the best results.

Canadian employers need a person who can demonstrate the following:

2(a) Positive Attitudes and Behaviours

- Self-esteem and confidence
- Honesty, integrity and personal ethics
- A positive attitude towards learning, growth and personal health
- Initiative, energy and persistence to get the job done

2(b) Responsibility

- The ability to set goals and priorities in work and in personal life
- The ability to plan and manage money and other resources to achieve goals
- Accountability for actions taken

2 (c) Adaptability

- A positive attitude towards change
- Recognition of and respect for peoples' diversity and individual differences
- The ability to identify and suggest new ideas to get the job done—creatively

3. Teamwork Skills

Those skills needed to work with others on a job and to achieve the best results.

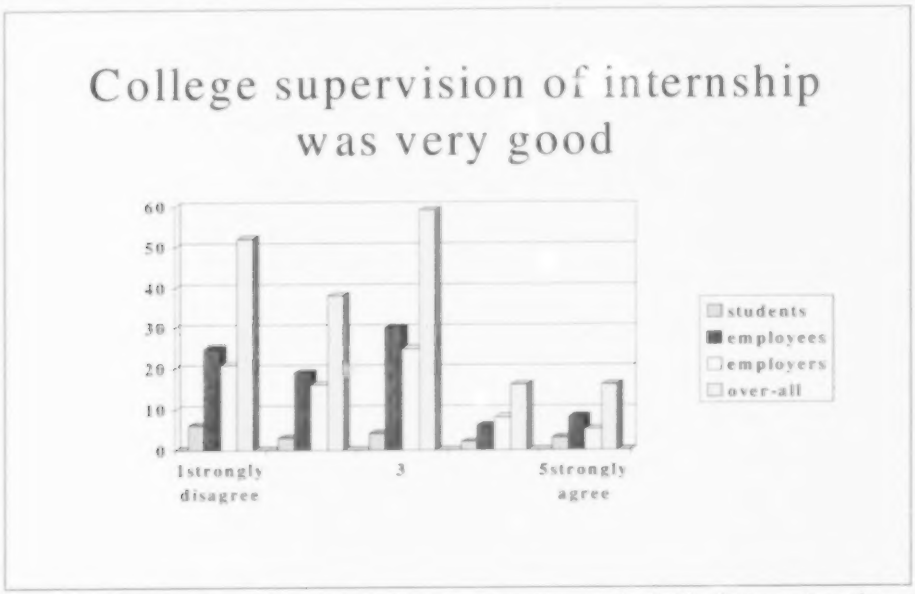
Canadian employers need a person who can do the following:

3(a) Work with others

- Understand and contribute to the organization's goals
- Understand and work within the culture of the group
- Plan and make decisions with others and support the outcomes
- Respect the thoughts and opinions of others in the group
- Exercise 'give and take' to achieve group results
- Seek a team approach as appropriate
- Lead when appropriate, mobilizing the group for high performance

INTERNSHIP

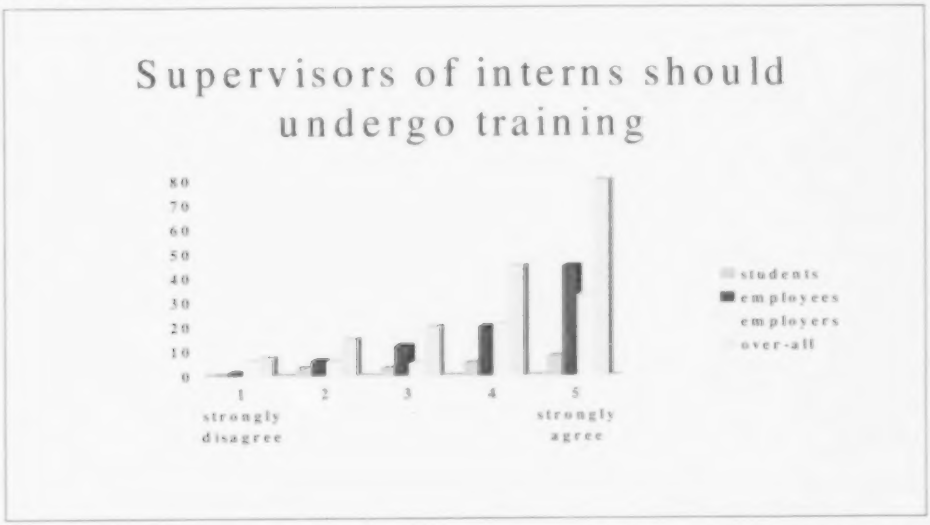
The following graphs reflect the responses of groups of respondents in focus groups: students, employers, employees and an over-all. The representations provide an image of trends and directions. They are not intended to represent absolute preferences.



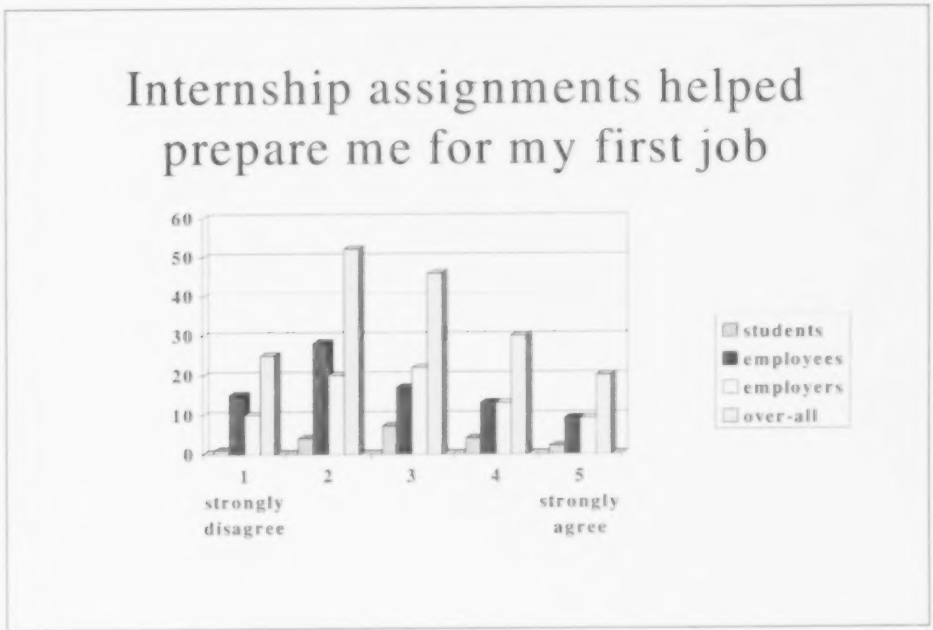
Interns and funeral directors believed that closer supervision was desirable. Interns strongly agreed that college supervision of their internship should be stronger. They expressed the same opinion about supervision from the Board. (See next graph)

Interns and Funeral Directors generally observed a very limited Board presence during the internship. Many suggested the Board presence should be increase.

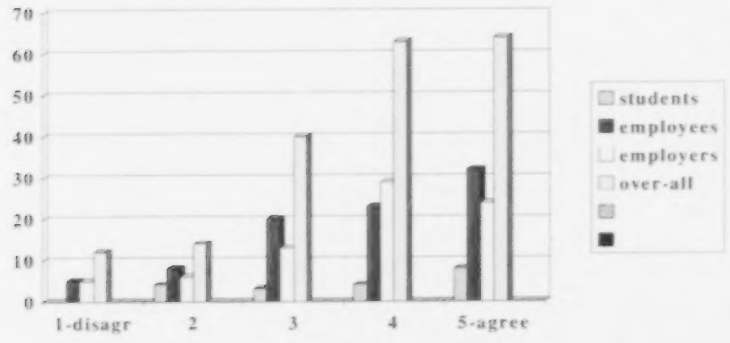
Interns, employers and employees strongly agreed with the notion that those who supervised interns should receive training.



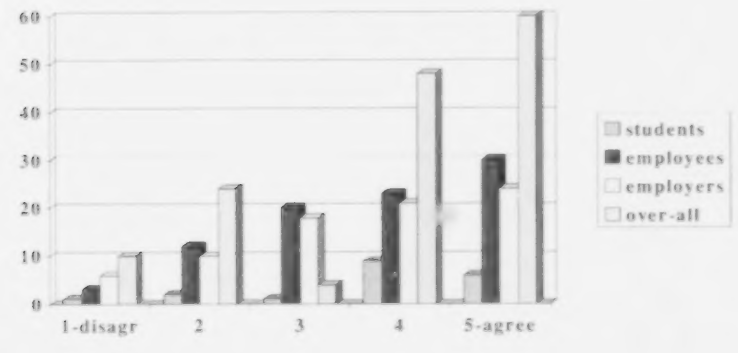
Interns and Funeral Directors believed the assignments needed to be more practical and more directly related to funeral services.

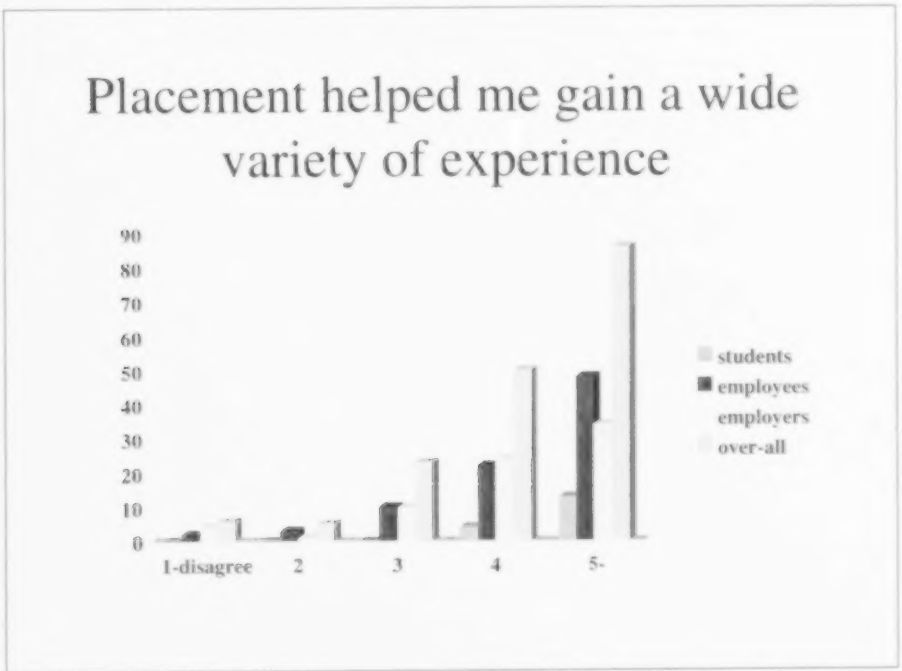


Funeral Director supervision of internship was very good



Placement helped prepare me for licensing examination

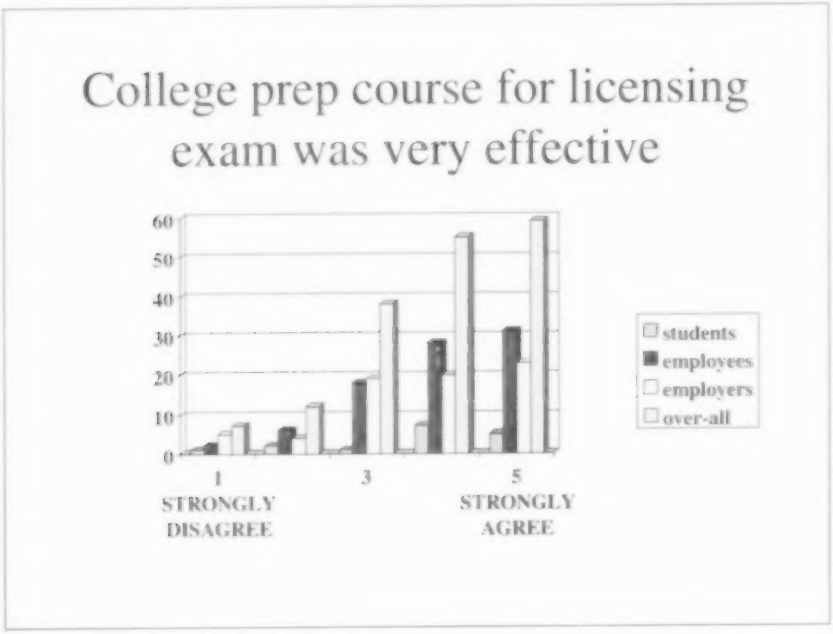


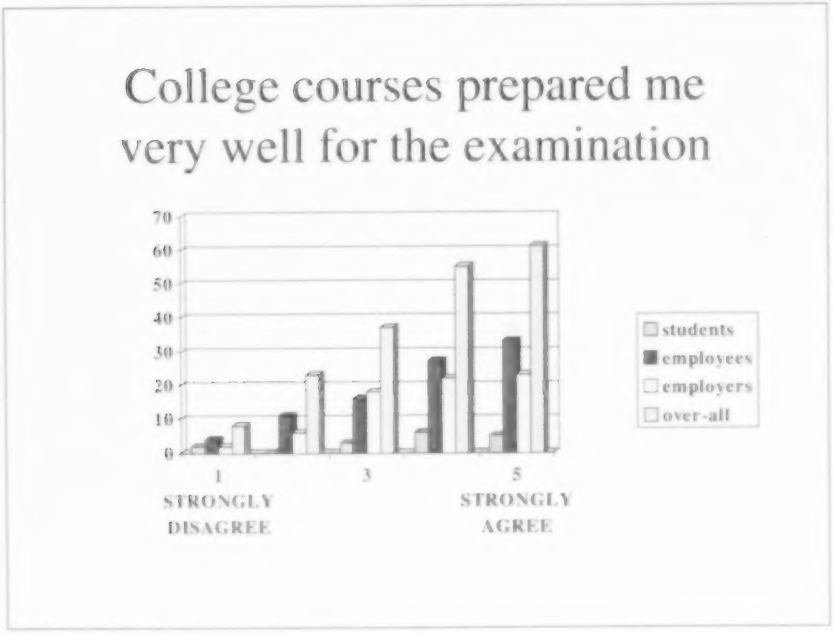

Placement helped me gain a wide variety of experience
90
80
70
60
50
40
30
20
10
0
1-disagree
2
3
4
5-
students
employees
employers
over-all

Internship prepared me very well for my first job
70
60
50
40
30
20
10
0
1 disagree
2
3
4
5 agree
students
employees
employers
over-all

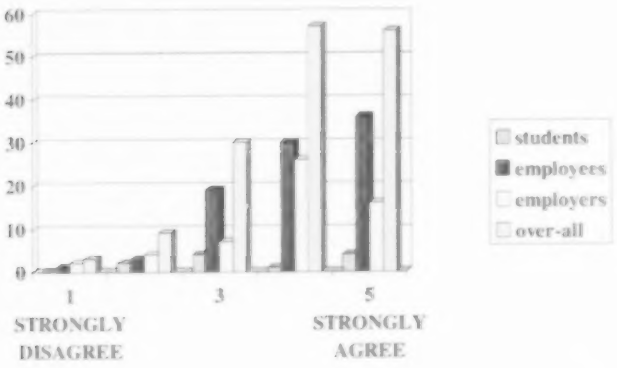
LICENSING

The following graphs reflect the responses of groups of respondents in focus groups: students, employers, employees and an over-all. The representations provide an image of trends and directions. They are not intended to represent absolute preferences.

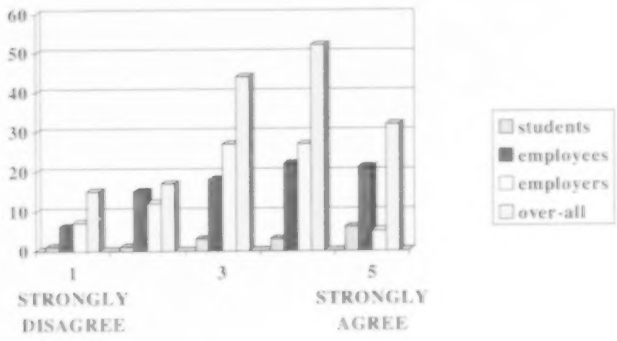




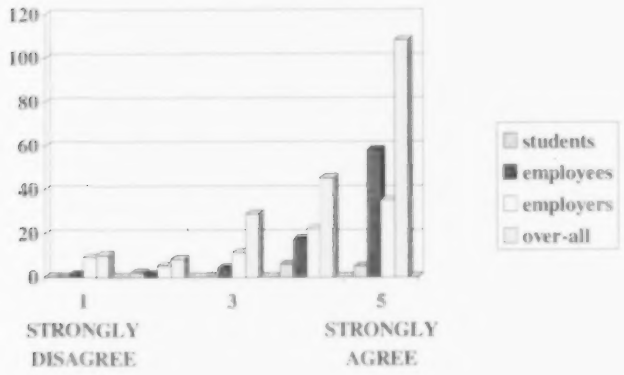
Examination was fair; it tested what was taught



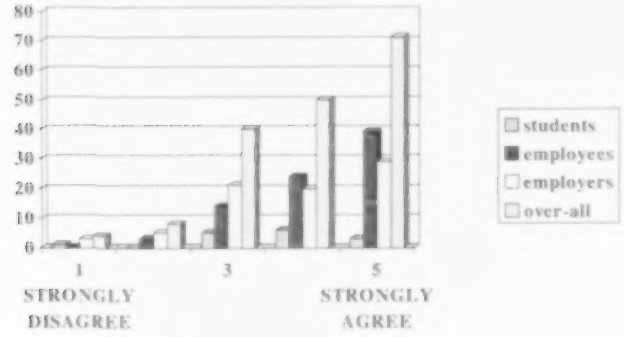
Licensing exam is best way to certify funeral directors

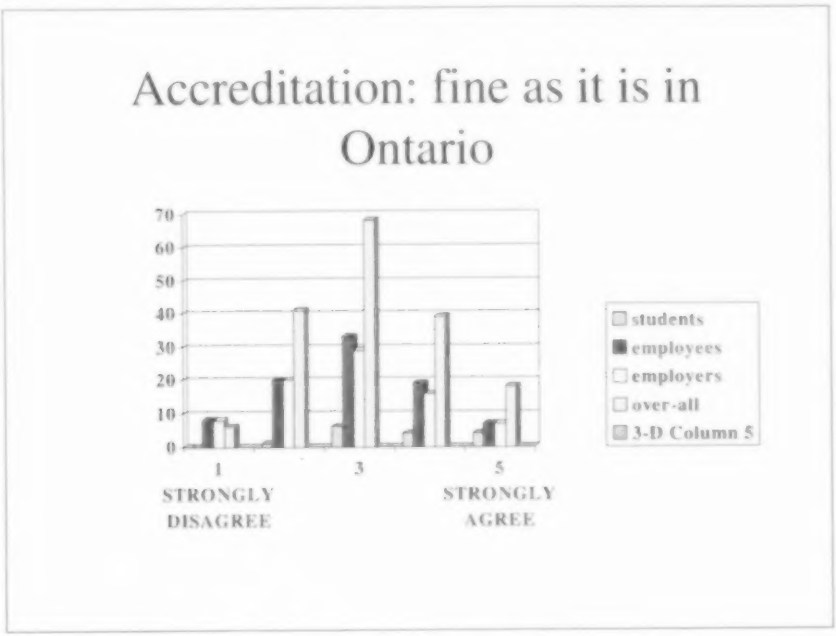


Mobility and reciprocity: write Canadian & American exams



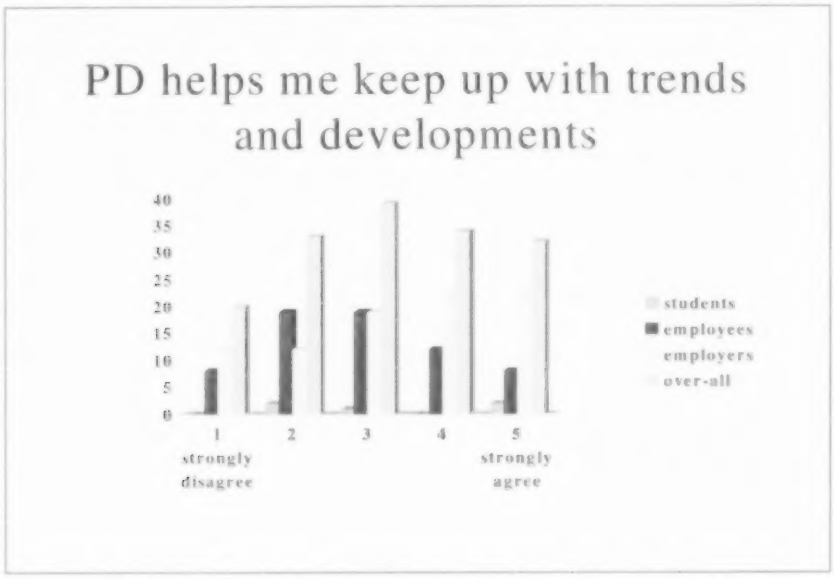
Form of external accreditation desirable for Ont. courses




Accreditation: fine as it is in Ontario
70
60
50
40
30
20
10
0
1
STRONGLY DISAGREE
3
5
STRONGLY AGREE
students
employees
employers
over-all
3-D Column 5

PROFESSIONAL DEVELOPMENT

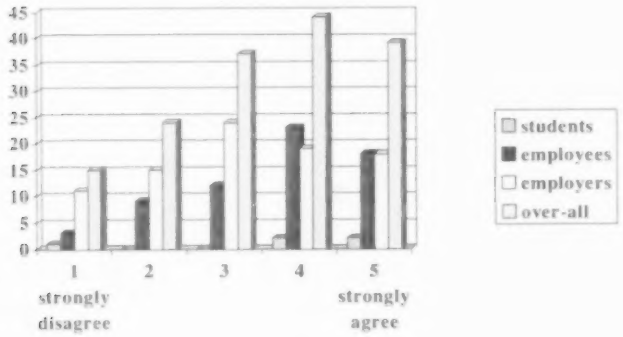
The following graphs reflect the responses of groups of respondents in focus groups: students, employers, employees and an over-all. The representations provide an image of trends and directions. They are not intended to represent absolute preferences.



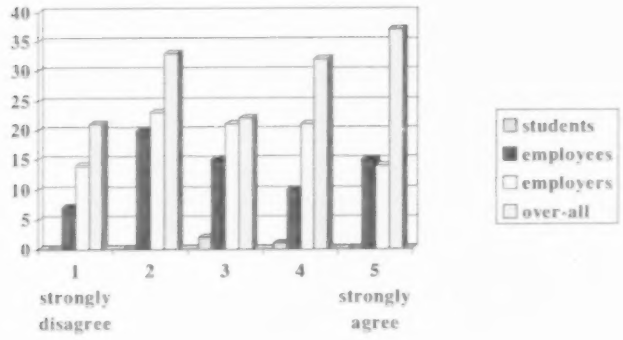
Comments on this topic suggested that while the current programme was good, it was not adequate to keep funeral directors informed in a rapidly changing world.

Respondents valued current post grad activities but favoured extending opportunities.

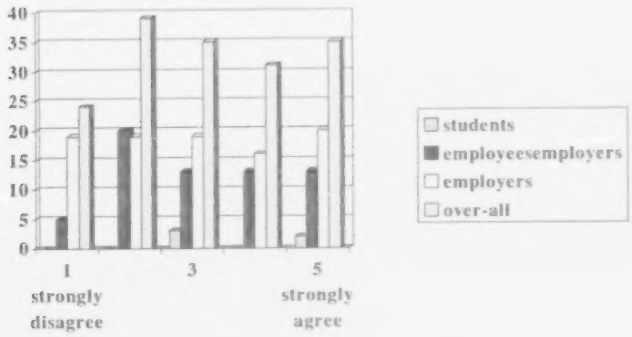
I want to register in distance education courses for credit



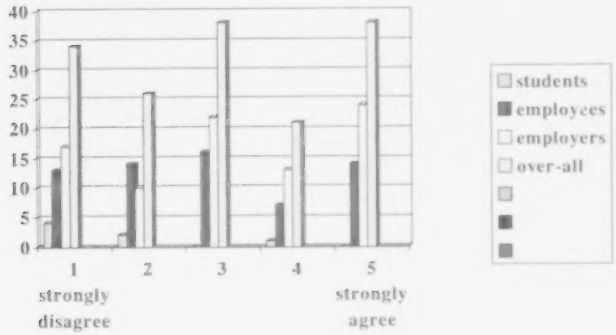
Restrict PD to technical, business procedural and inter-personal

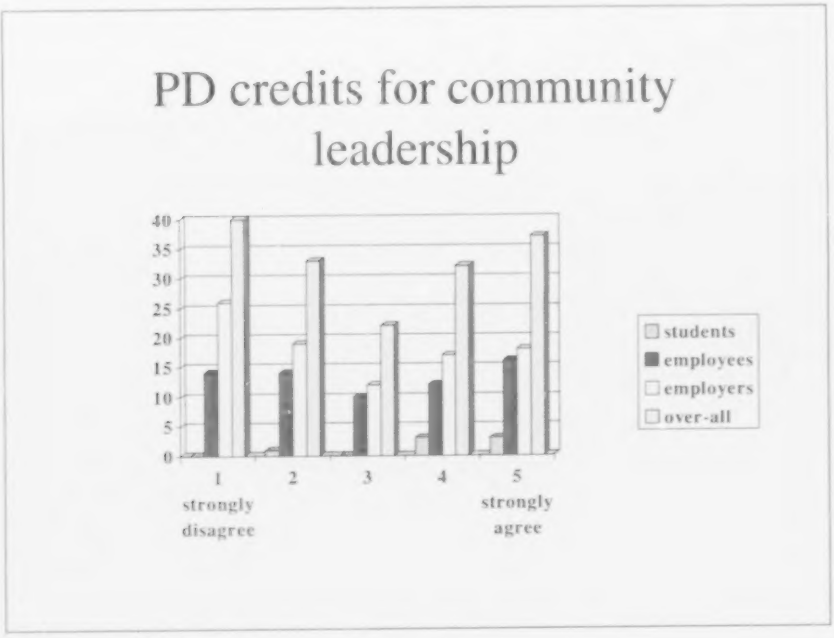


Current PD programs have not met my needs



Prefer present PD program: 11/2 days per 5 years vs credits




PD credits for community leadership
40
35
30
25
20
15
10
5
0
1
2
3
4
5
strongly disagree
strongly agree
students
employees
employers
over-all

Draft Implementation Plan for Recommendations

Recommendations for Pre-admissions

A-1) *Admissions Panel – Implementation Committee to develop guidelines for membership, functions and responsibilities*
Assign responsibilities for developing guidelines for Portfolios, Confidentiality and Observation Period to a Special Task Team to be identified by the Implementation Committee *e.g. Chair and representatives of the Colleges, with power to add three additional representatives.*

A-2) *Recruit and admit candidates beyond the minimum requirements*
Task Team consisting of representatives of the two colleges and three others; team to develop guidelines and communication plan for implementation by the Colleges, Funeral Directors and the Admissions Panel.
Estimated costs: to be developed (TBD)

A-3) *Develop guidelines*
Assign to a Task Team of 3-5 persons
Estimated costs: TBD

Recommendations for Academic Program

B-1) *Create role of Education Officer*
With Board approval, the Registrar will advertise, interview and select, with the support and appropriate involvement of Implementation Committee members, an individual with all or most of the qualifications listed below:

- Funeral Director
- Training in education and experience as a teacher/researcher
- Superior communication skills (oral, written and technical)
- Management and interpersonal skills
- Ability to organize and work with teams and large groups as well as a wide range of individuals
- Other attributes as identified by the Implementation Committee

Major Functions: *(This will be developed by the Implementation Committee)* Liaise, Co-ordinate, Communicate, Report, Organize, Initiate, Mediate disputes and resolve problems.

Reporting Relationship: Through the Registrar to the Board of Funeral Services.

Salary and Compensation: TBD – but commensurate with experience and qualifications. It is recognized that the skill set needed to implement this report might be different from the skill set required of a permanent Education Officer.

B-2) *Assign the lead to the Education Officer working with a Task Team*
Suggest replicating the task analysis process and adding the competencies and standards to the tasks.
Estimated costs: TBD

B-3) *Colleges review current programs and instructional practices*
Lead must be at the Colleges with support from the Education Officer and one or two funeral directors.

B-4) *Extend the academic programs*
No implementation recommended at this time; await the results of the previous review.

Recommendations on Internship

C-1) *Designate and train funeral directors to supervise interns (preceptors)*
Develop a Task Team (3-5 persons) to be appointed by the Implementation Committee to work with the Education Officer.

Ask funeral directors to volunteer for a small group to be trained and to act as a pilot project for the first year. Extend the programme each successive year until there are sufficient preceptors.
Estimated Costs: TBD

C-2) *Assign to a joint committee (Task Team) of representative persons to conduct a short term review of existing assignments and recommend refinements as well as additional support for interns and Funeral Directors in the way of directions, materials, standards of performance and supervision.*
Estimated Costs: TBD

Recommendations on Licensing

D-1) *Engage a consultant who is an expert in assessment*
Assign responsibility to the Registrar and the Education Officer with direction from the Implementation Committee.
Estimated Cost: TBD

D-2) *Collect and analyze data*
Assign responsibility to the Education Officer to collaborate with Colleges and generate a report for the BOFS each year.
Estimated Cost: TBD

D-3) *Engage a programme evaluation expert*
Registrar and Education Officer should be guided by the direction of the Implementation Committee
Estimated Cost: TBD

D-4) *That the Colleges should continue to pursue accreditation of the two college training programmes with the American Board of Funeral Service Education; that the BOFS continue to support this endeavor by the colleges.*

Recommendations on Professional Development

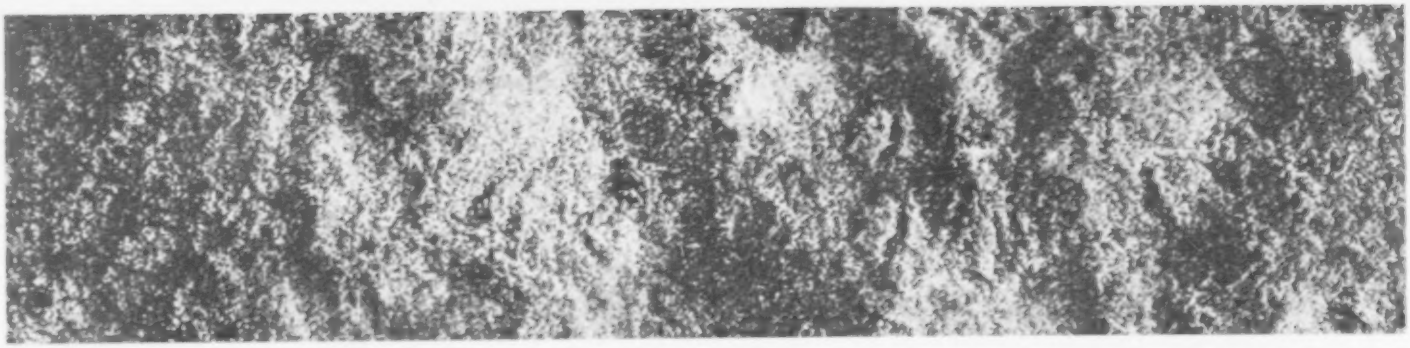
E-1) *Expand requirements and options for professional development*
Recommend gradual implementation over three to five years. Develop a Task Team to write guidelines with support from staff and Education Officer.

Develop trial units in collaboration with regional funeral directors. Involve OFSA, College staff and possibly other Community Colleges across Ontario.
Estimated Cost: TBD

E-2) *Approve course options*
Create a Professional Development Panel and designated staff as assigned by the Registrar.
Estimated Cost: TBD

E-3) *Professional Development Panel*
The panel will be responsible for identifying areas of need and approving course offerings.
The Panel should consist of five persons to be identified by the Implementation Committee.
Staff, appointed by the Registrar will provide support.
Estimated Cost: TBD

E-4) *Education Officer will work with the Education Panel to develop guidelines for credit-based programmes, help determine professional needs and identify criteria for the approval of new programs and units.*



Board of Funeral Services
Conseil des services funéraires

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